Introduction

ScanSeek is a tool designed to provide quick, flexible, and powerful web-based applications in a flash. It can fit a host of different circumstances and mobile application needs and offers an intuitive interface that includes the following robust features:

- Secured User Validation
- Centralized Dashboard
- Internal Emulator
- Custom Reports
- Import and Export of Data

This **User Manual** will provide you with step-by-step instructions for utilizing the **Web-Based Application** as well as the **Mobile Device**.

If, however, you require further assistance or have questions regarding the information contained in this **User Manual**, please contact **IntelliTrack Support** at 888-583-3008 and press option 6. Representatives are available to assist you between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, excluding Holidays.

Getting Started with ScanSeek

ScanSeek provides you with an **easy-to-use**, **web-based application** that requires no development knowledge or experience.

It enables you to design applications in a very timely manner and provides an internal **Emulator**, which allows you to **test** and **validate** applications prior to deploying them to your **Mobile Device**.

The chapters that follow will instruct you on using the web-based application to manage users, applications, data tables, and reports.

Logging In

Once a **New User** account has been created for you, proceed as follows:

- Enter your **User ID** and **Password** at the Log In screen seen below.
- Click on **Login**.
- If you cannot recall your Password, click on **Forgot Password** to receive an Email that contains the information.

Please Note: If the application remains idle for **twenty (20)** minutes, you will be **automatically** logged out.

Home Page

Upon logging in, the **Home Page** will be displayed, as seen below. The left side of the screen contains two panels, which will be displayed on each screen throughout the entire **ScanSeek** application.

The upper panel consists of two views, each of which are described below:

- **Design:** This view is used when **creating**, **testing**, **validating**, and **modifying** applications prior to publishing.
- **Published:** This view contains applications that have been finalized and can no longer be modified. Once published, these applications can be accessed by **Non-Administrative Users**.

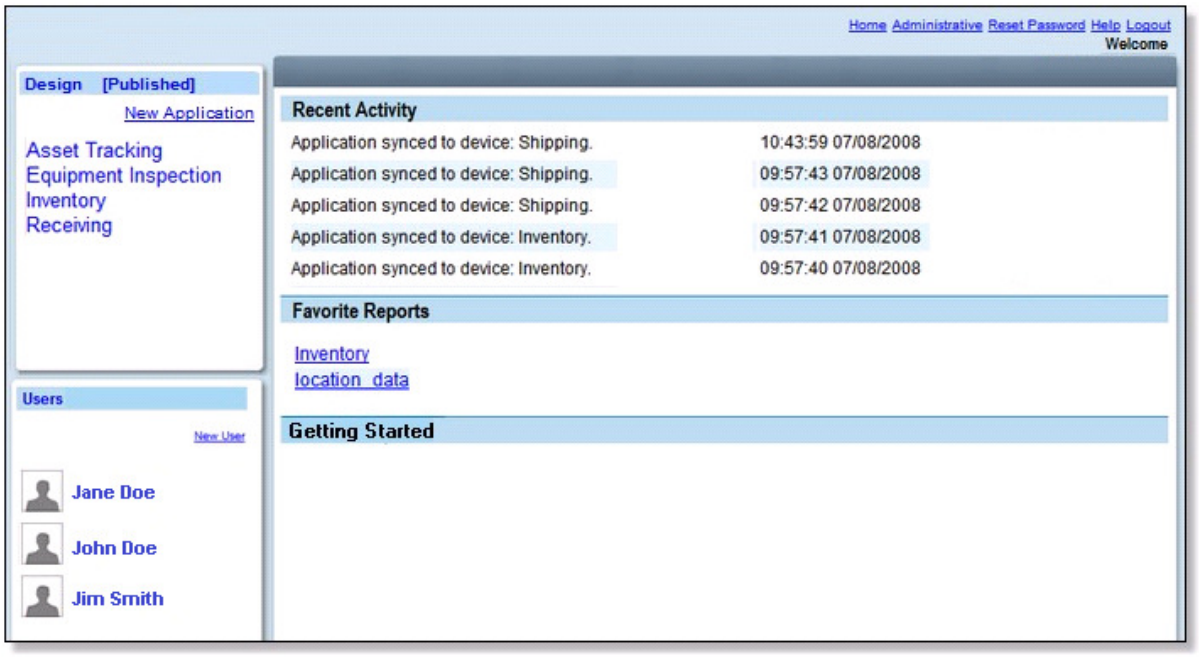
It also contains a link for adding a **New Application**.

The bottom panel contains a list of **Users** along with a link for adding a **New User**. From here, you can click on any of the users listed to send an **E-Mail Message**, which opens in a new window.

The main body of the **Home Page** contains three sections, as described below:

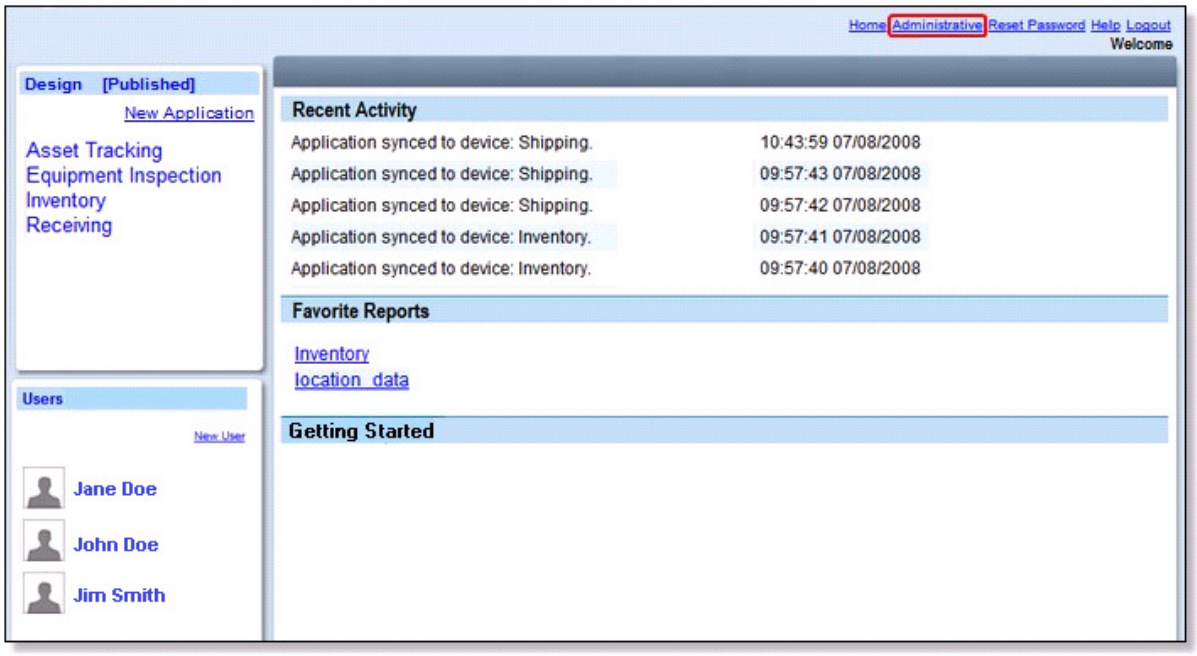
- **Recent Activity:** This will contain a list of actions performed, including but not limited to, application creation and publishing, synchronization, and posting of data records.
- **Favorite Reports:** When **Reports** are created, you have the ability to add them to your list of Favorites. They will then be displayed on the Home Page, as seen below.
- **Getting Started:** This section will contain information from **IntelliTrack Inc.**, such as announcements of new features and tips on using **ScanSeek.**

In addition, you will find **quick links** in the upper right corner for **Administrative**, **Reset Password**, **Help**, and **Logout** functions.



Managing Users

From the **Home Page**, click on **Administrative** in the upper right corner of the screen.

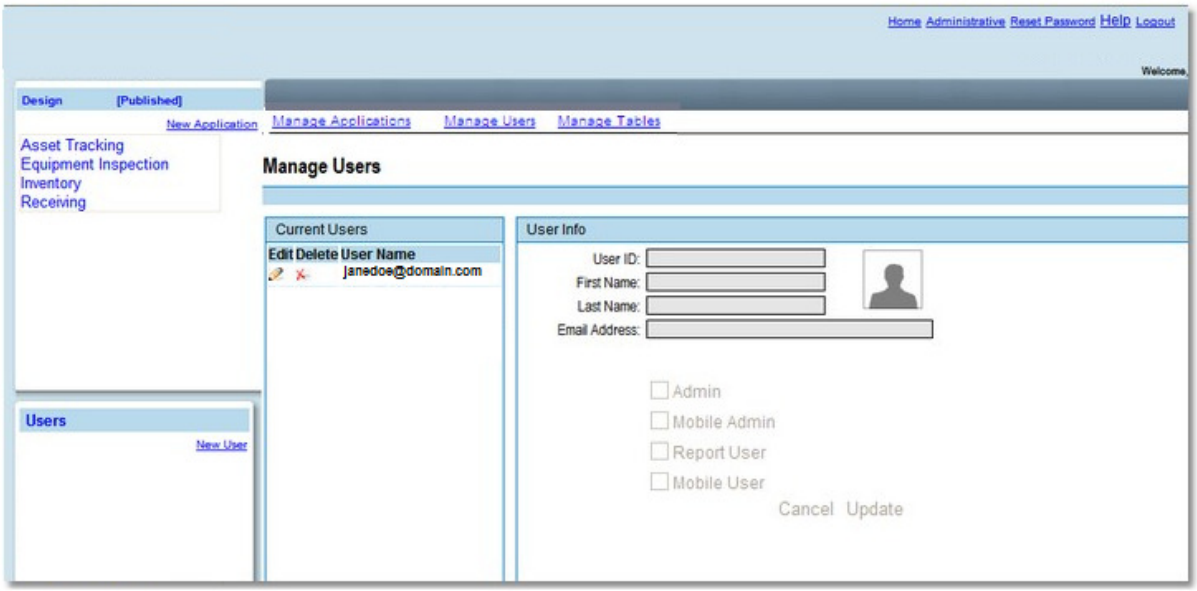


This will launch the screen seen below. Proceed by selecting **Manage Users**.

The **Manage Users** screen contains a list of **Current Users**. From here, you can **Add**, **Edit**, or **Delete** a User.

For instructions on completing these functions, click on the links that follow:

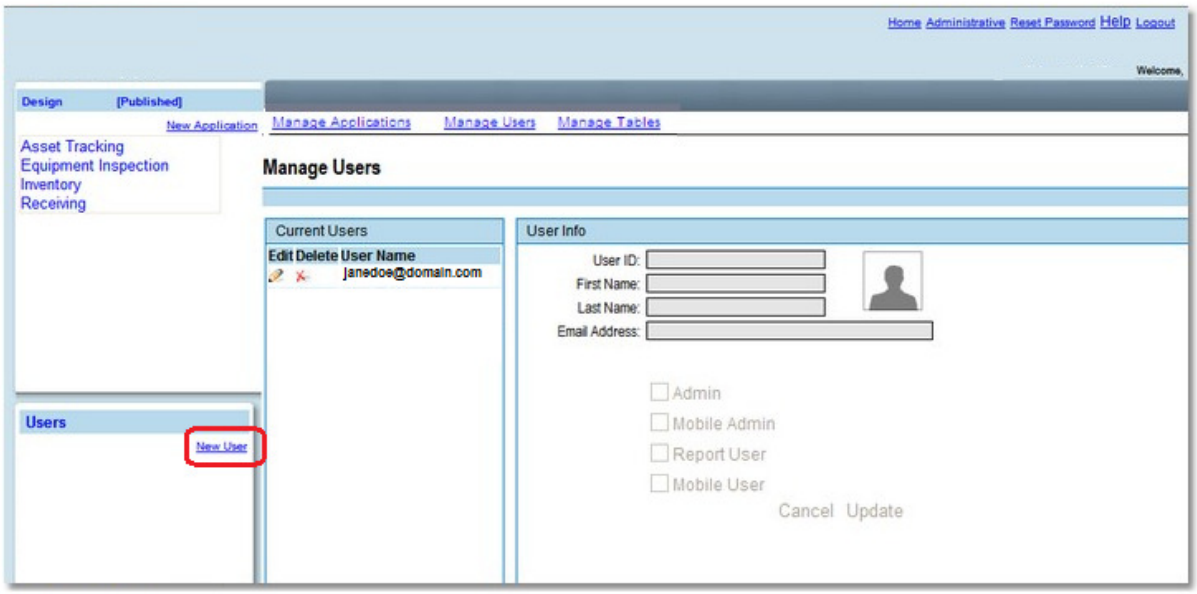
- **How to Add a New User**
- **How to Edit a User**
- **How to Delete a User**



How to Add a New User

Begin by clicking on **New User** in the lower left panel, as seen below.

Please Note: The **New User** function can be accessed from every screen within the **ScanSeek** application in the lower left panel.



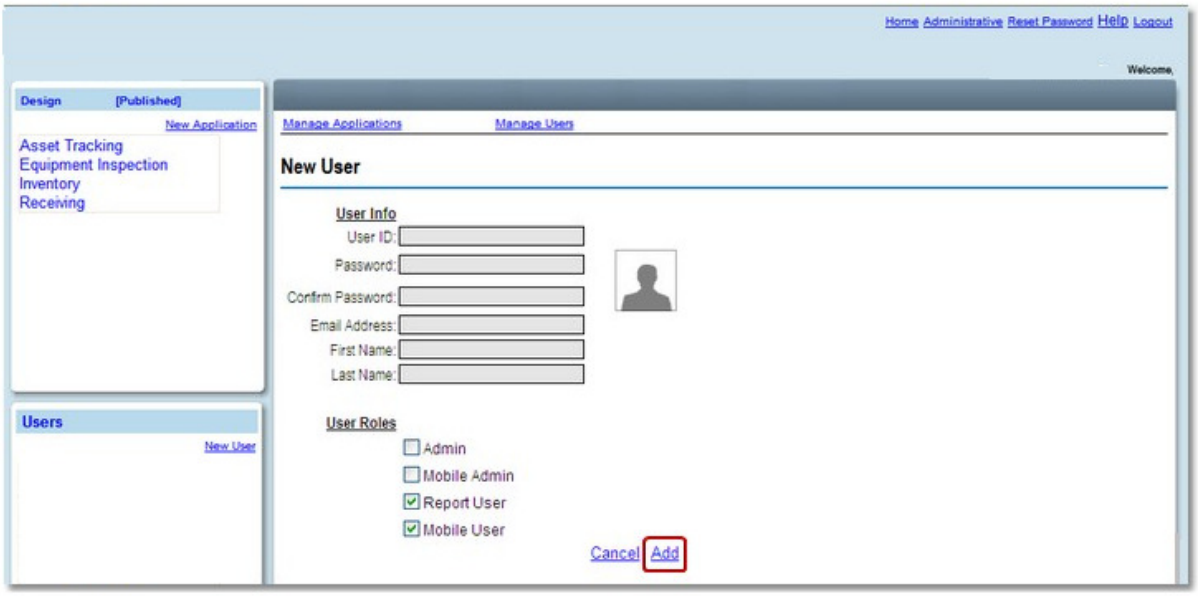
Doing so will generate the **New User** screen, seen below. Proceed by completing the **User Information** and then assign one or more **User Roles**, as defined below:

- **Admin:** Has Full User Privileges
- **Mobile Admin:** Has all of the rights of a **Mobile User** and can also perform the following functions:
  - o View, purge, and export data from the **Data View** tab
  - o View, but **not** Delete, Lookup Tables
  - o Upload Lookup Data using **ScanSeek**
  - o Assign the roles of **"Mobile User"** or **"Mobile Admin"** to new or existing users
- **Report User:** Can View and Generate Reports, but has no Access to the Web Application
- **Mobile User:** Has Access to the Mobile Application Only

Please Note: Report User and **Mobile User** Roles are pre-selected. You may elect to remove either of these roles by clicking on the check mark **or** you may assign the **Admin** or **Mobile Admin** role to this individual.

When you are satisfied with the information entered, click on **Add**. The screen will now contain the notation **"User Added Successfully"**. If you wish to abort this action, click on **Cancel**.

For instructions on **How to Edit a User**, **click here**.



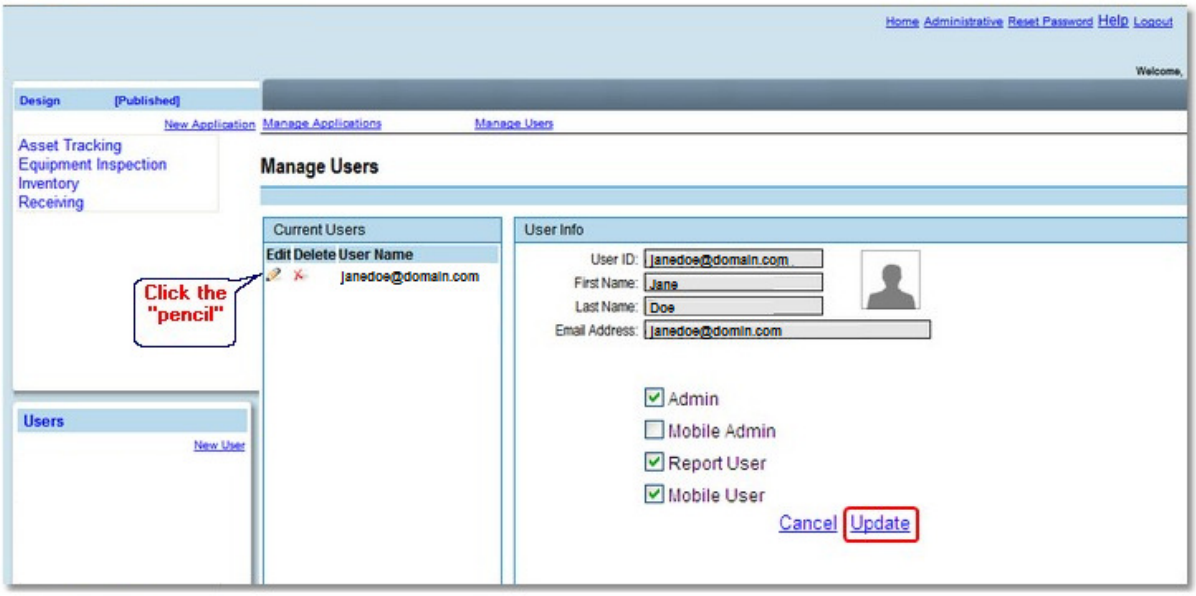
How to Edit a User

Begin by clicking on the **Pencil** icon to the left of the **Current User** you wish to **edit**. Doing so will populate the **User Info** fields to the far right of the screen, as seen below.

You may now **Edit** the four fields containing the user information. In addition, you may elect to **Edit** the **User Roles** assigned to this individual by selecting or deselecting them from the list found below their data.

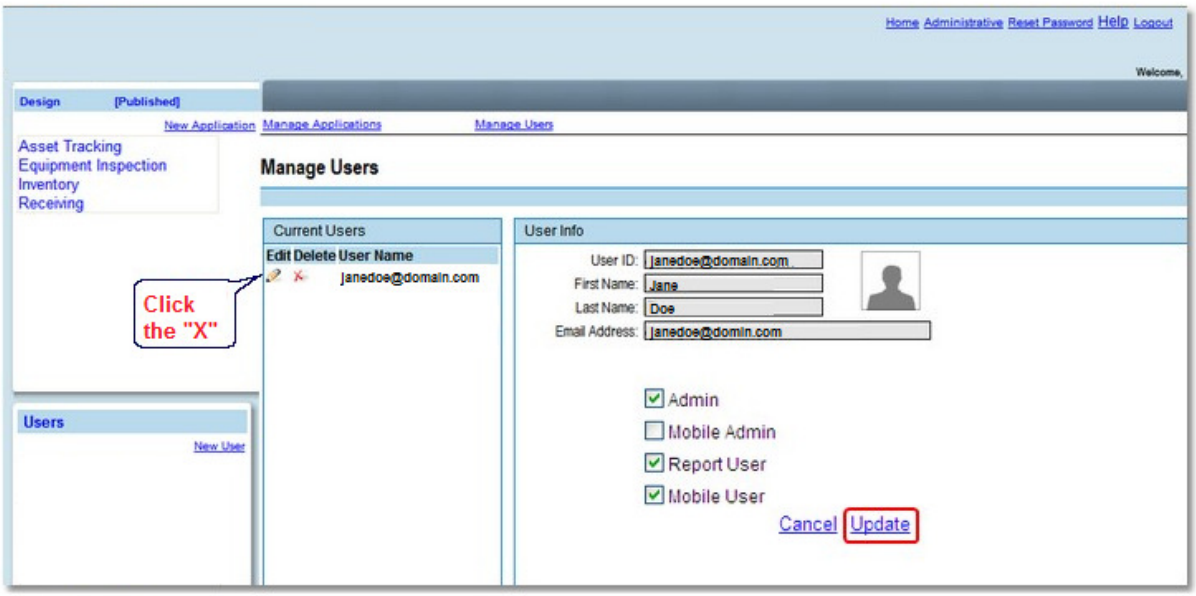
When you are satisfied with your changes, click on **Update**. Click on **Cancel** if you wish to abort this action.

For instructions on **How to Delete a User**, **click here**.

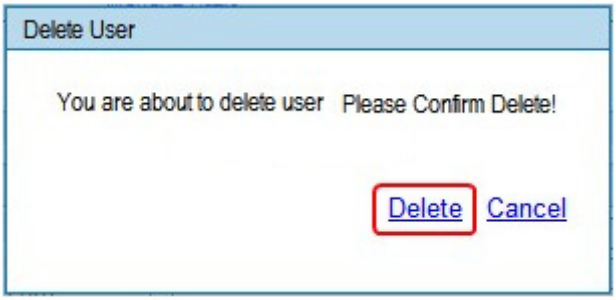


How to Delete a User

Begin by clicking on the **"x"** to the left of the **Current User** you wish to **delete**.

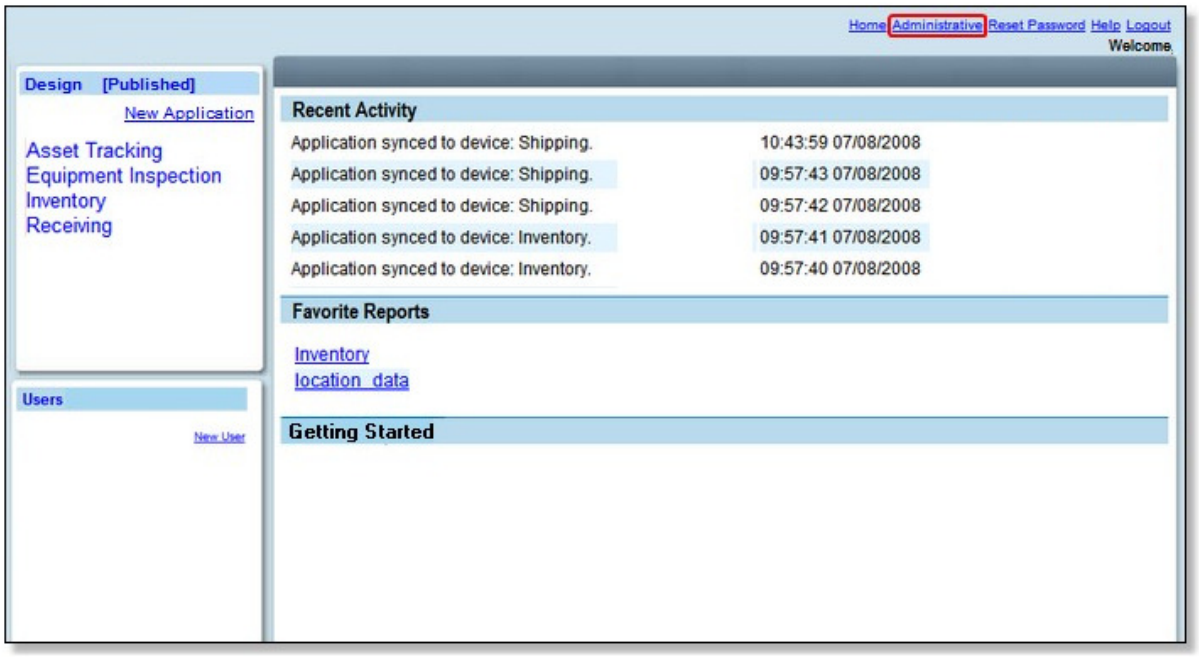


This action will generate the **Confirmation** screen seen below. Click on **Delete** to proceed or on **Cancel** to abort this action. If deleted, the fields under the User Info column will be cleared and the notation **User Deleted** will be displayed.

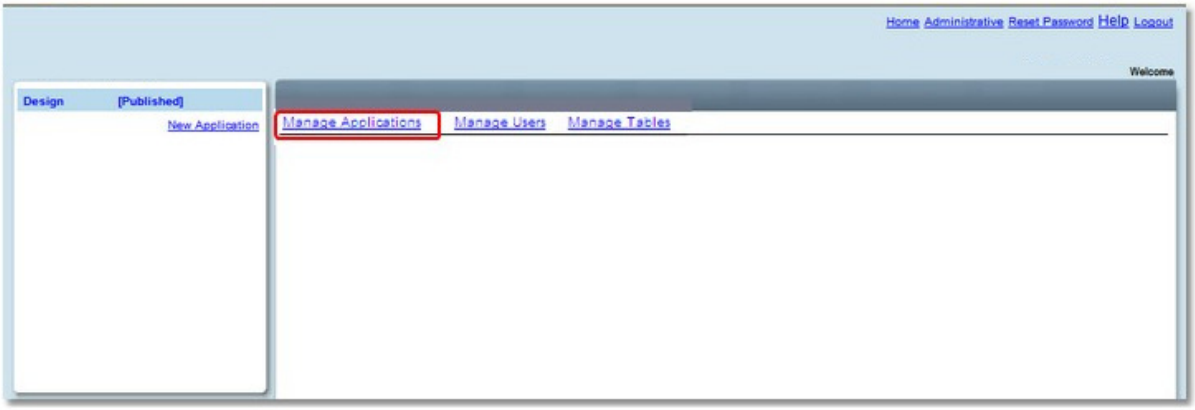


Managing Applications

To access this feature, begin by clicking on **Administrative** in the upper right corner of the **Home Page** screen, as seen below.



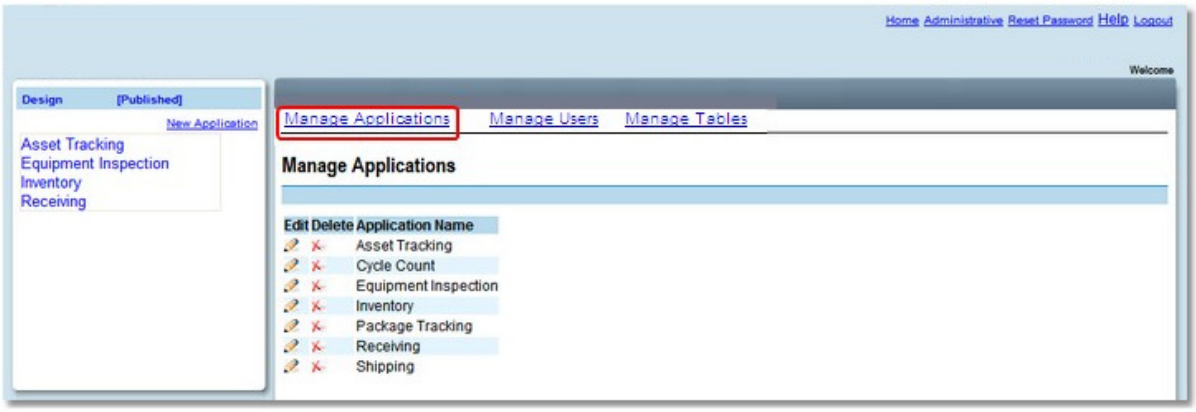
This will launch the following screen, where you will click on **Manage Applications**.



If applications have already been entered, they will be listed as shown on the screen seen below. Additionally, they will be displayed in the **upper left panel** under their appropriate classification of either **Design** or **Published**.

From this screen, you can **Add**, **Edit**, or **Delete** applications. Instructions for completing these functions can be accessed by clicking on the links that follow:

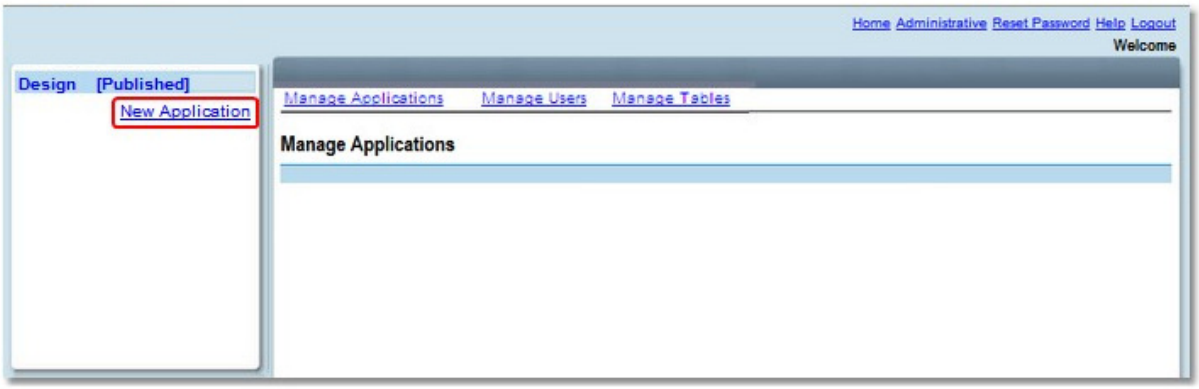
- **How to Add a New Application**
- **How to Edit an Application**
- **How to Delete an Application**



How to Add a New Application

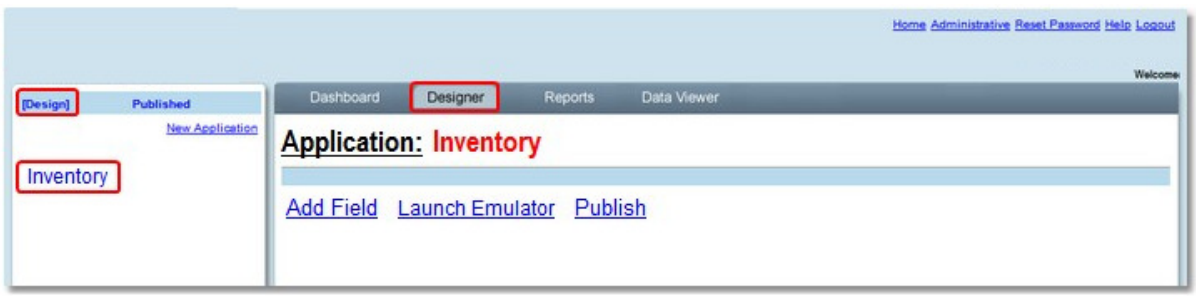
From the **Manage Applications** screen, click on **New Application** in the upper left panel, as seen below.

Please Note: The **New Application** function can be accessed from every screen within the **ScanSeek** application in the upper left panel.



This will launch the **Add New Application** screen. Enter an **Application Name** in the field provided and click on **Create** or click on **Cancel** to abort this action.

Your **New Application** will now appear in the upper left panel under the **Design** classification, as seen below. In addition, the **Dashboard** will be displayed on the right side of the screen under the **Designer** tab.

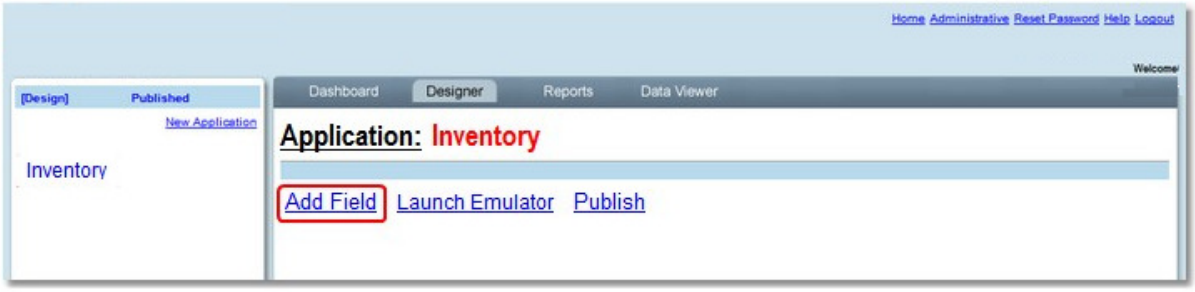


The next step is to begin **adding fields**. Instructions for this function as well as for **validating input**, **validating look-up tables**, and **adding branching rules** can be found by clicking on the links found below:

- **How to Add a New Field**
- **How to Validate Input**
- **How to Validate Look-Up Tables**
- **How to Add Branching Rules**

How to Add a New Field

Once the **New Application** has been created, you will begin to **Add Fields** by clicking on the link seen below.



At the **Add Field** screen that follows, complete the **Field Name**. This should be a **concise description** for the data being collected, such as **PO #** or **Pallet ID**, for example.

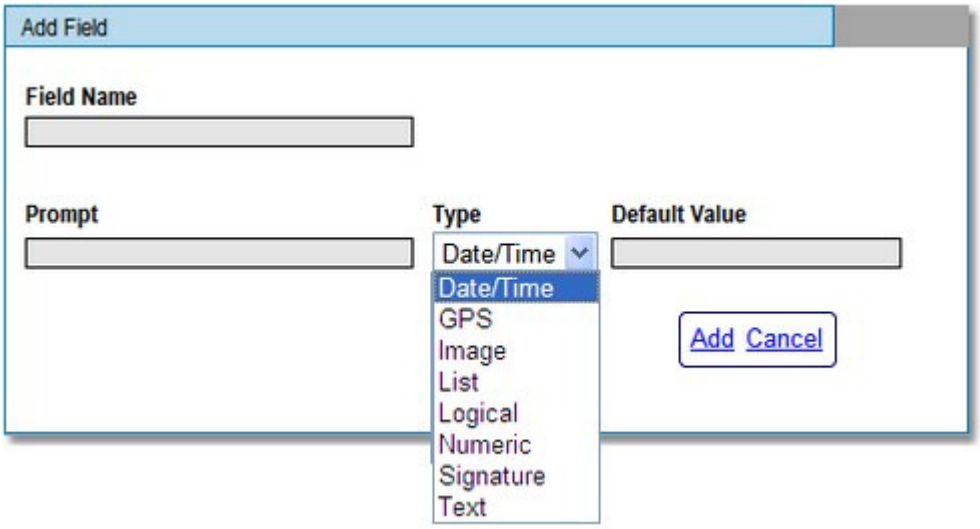
Next, enter a **Prompt**. The text entered in this field will be displayed on the **Mobile Device** and will **"prompt"** the user to complete a specific **"action"**. Examples include **"Enter PO #"** or **"Enter Pallet ID"**.

Lastly, select a **Type** from the drop down list, which include the options defined below:

- **Date/Time:** The ability to select a date from a calendar. The time will automatically be populated with the current time, regardless of date chosen.
- **GPS:** A field for Latitude and Longitude Coordinates
- **Image:** Available in the Next Version
- **List:** A defined list of multiple choices.
- **Logical:** A **"check box"** object that serves to confirm an action, condition, etc. If checked, it implies one thing; if unchecked, another.
- **Numeric:** Values that include integers, decimals (up to two decimal places), and dollars.
- **Signature:** A text box that enables you to capture signatures on the **Mobile Device** using the stylus.
- **Text:** A value consisting of alphabetic characters only **or** a combination of alphabetic and numeric characters.

> **Please Note:** Although **Date/Time** is an option under the **Type** drop down list, **ScanSeek automatically** captures this data along with the **User ID**.

The **Default Value** is an **optional** field and applies only to **Text**, **Numeric**, **Logical**, or **List** Data Types. Proceed by clicking on **Add** or on **Cancel** to abort this field addition.



The **New Field** will now be displayed, as seen below. Continue to enter additional fields, as needed, by clicking on the **Add Field** link.

Please Note:
If the **Type** for a **newly added field** is:

- A **List**, it will require **editing** in order to enter the **List Items**.
- **Numeric**, you can specify the **number** of **decimal places** when editing.
- **Text or Numeric**, you can elect to **allow barcoding scanning**.

Once all **Fields** have been entered, you may find it necessary to perform modifications. To learn how to **edit** a field, click on the link found below.

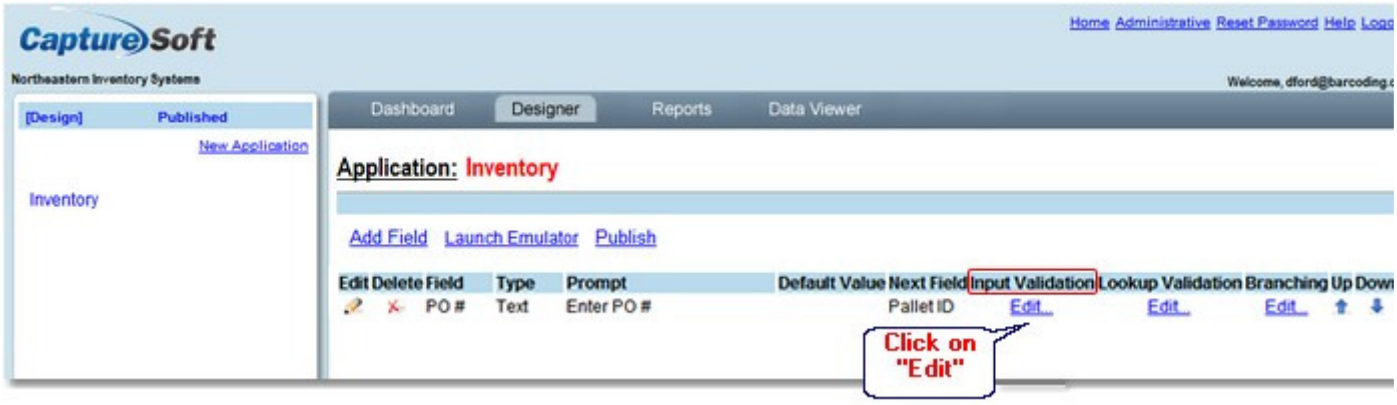
- **How to Edit a Field**

Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard
Designer
Reports
Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO Number 0 PO # Edit Edit Edit

How to Validate Input

To enter **Input Validation** for newly added fields, click on **Edit** beneath the **Input Validation** column, as seen in the screen below.

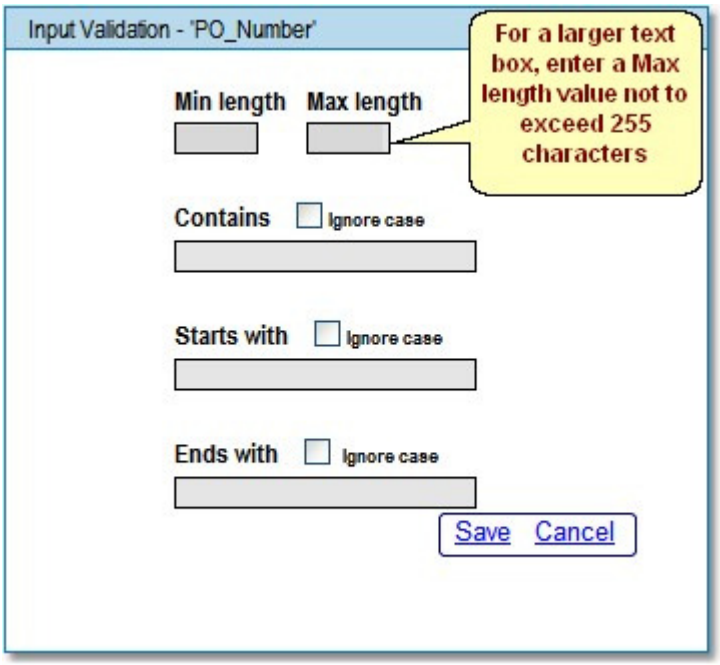
Please Note: The **"Edit"** link will be displayed for **all** Fields entered; however, it can only be used to validate **Text** or **Numeric** Data Types.

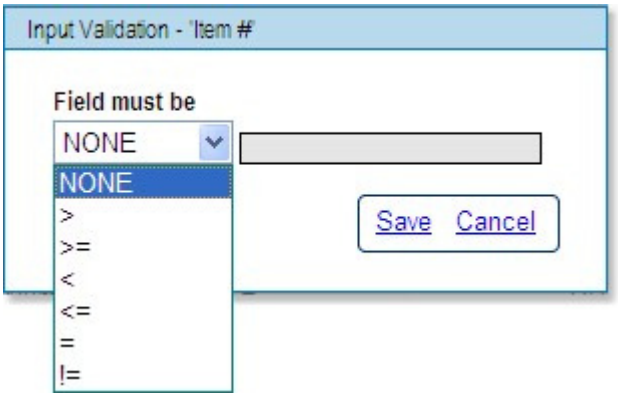


An **Input Validation** screen will be displayed for the **Text** or **Numeric Data Type** selected, as illustrated by the following two screens respectively.

> **Please Note:** If you wish to implement a text box that is **larger** than the default text box in order to capture comments or additional information, specify a **Max length** value that is greater than a single line's character length (measured using the current font). This Max length value cannot exceed **255 characters**.
>
> **Also Note:** Samples of the default text box as well as one with a Max length value of 255, as viewed on the **Emulator**, can be found at the bottom of this screen.

Proceed by entering the **Validation Parameters** and click on **Save** or click on **Cancel** to abort this action.

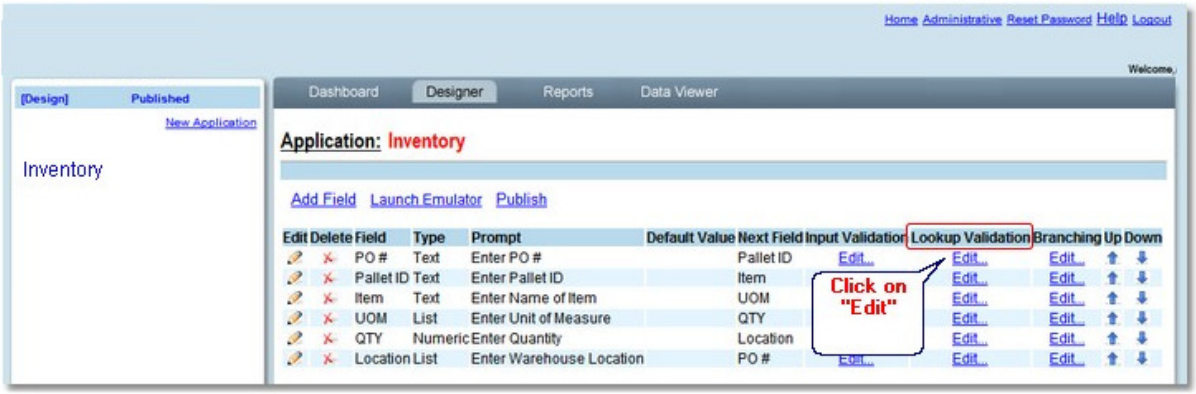




How to Validate Look-Up Tables

Please Note: In order to validate data against a **Lookup Table**, the table must be uploaded to **IntelliTrack's Server** utilizing **ScanSeek eXchange**.

Once that step has been completed, you will be able to enter **Lookup Validation** values while designing the application. To do so, click on **Edit** beneath the **Lookup Validation** column, as seen in the screen below.

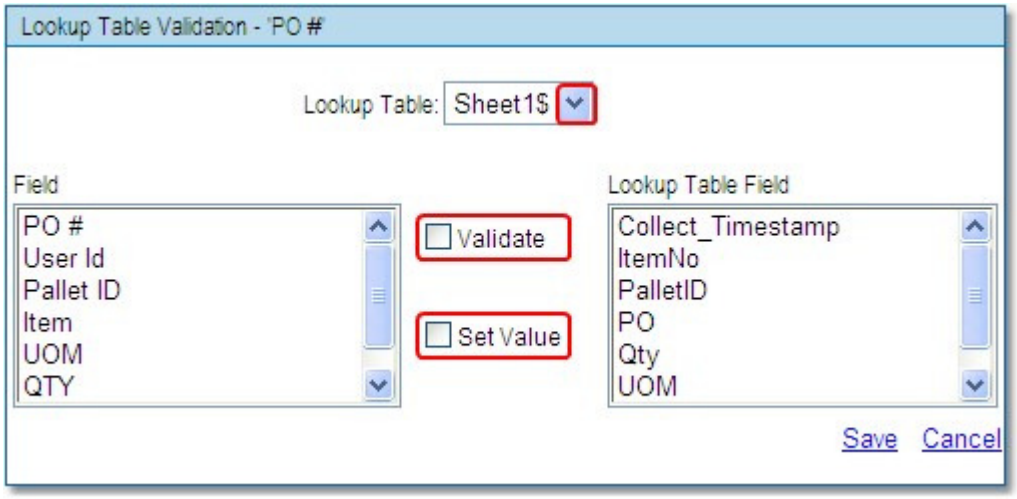

Home Administrative Reset Password Help Logout
Welcome,
[Design] Published
New Application
Inventory
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click on "Edit"

This will launch the screen that follows, which consists of two columns. The column on the left displays each of the **Fields** contained in the **Application** while the column on the **right** displays all of the **Fields** that makes up the **Lookup Table**. The middle of the screen contains validation types.

To begin, use the drop down arrow to select the proper **Lookup Table**. Proceed by choosing the **Field** on the left that you wish to validate.

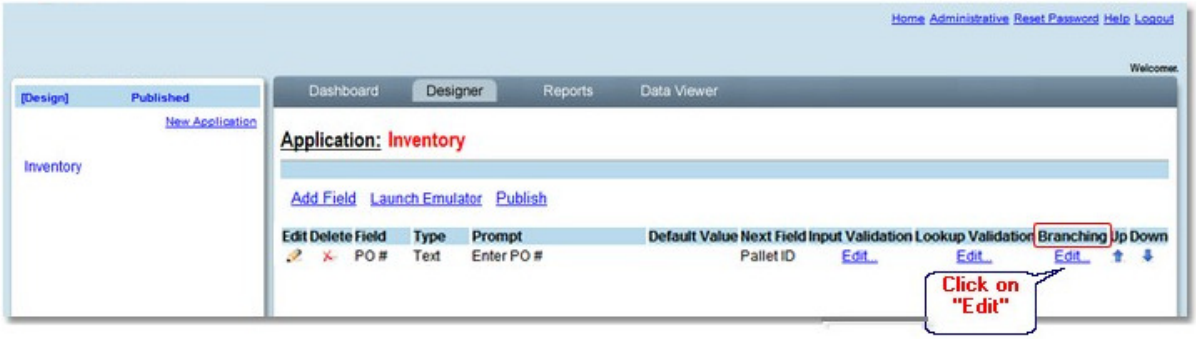
When you place a check mark in the box to the left of **Validate**, you are identifying the field you want to look up against. When you place a check mark to the left of **Set Value**, you are establishing a means by which to acknowledge that the record found is correct.

As data is collected on the handheld, it will be compared to the **Validation** parameters established here.



How to Add Branching Rules

To enter **Branching Rules** for each newly added field, click on **Edit** beneath the **Branching** column, as seen in the screen below.

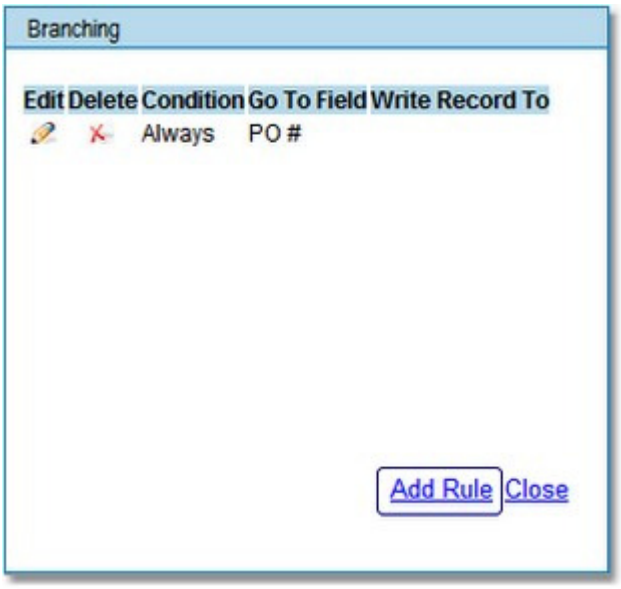


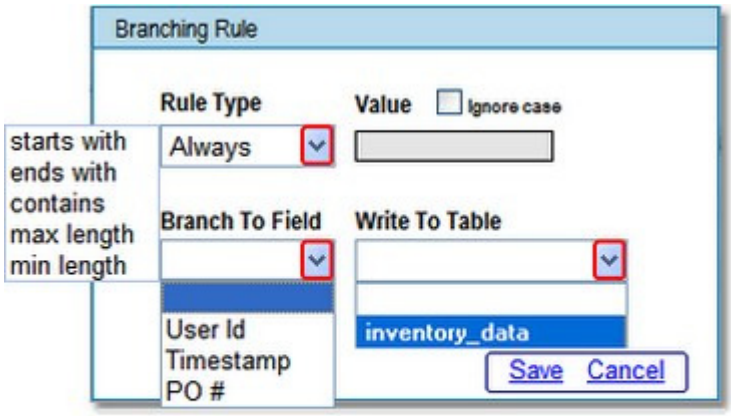
The **Branching** screen that follows will now be displayed for the newly added field. In all cases, a **Branching Rule** will **automatically** be established that will direct you to the **next field** within the application. However, it is important to note that **Multiple Branching Rules** can be assigned to each field.

To do so, click on **Add Rule** to generate the **Branching Rule** screen seen in the second screen below. Use the **drop down** lists to complete the **Rule Type** and **Branch To Field**. Enter a **Value**, if needed, and then click on **Save** or on **Cancel** to abort this addition.

> **Please Note:** Under normal circumstances, the **Write To Table** field remains blank until adding the **Branching Rule** for the **last prompt** before the application **"loops"** back to the beginning. If more than just the **"default" table** has been defined, the data **can** be written to **multiple tables**, but **not** for the **same** Branching Rule. Lastly, the **Write To Table** field **must** be selected in order to **write out data** and populate **reports**.

> **Also Note:** As fields are added to your application, the list of options under **Branch To Field** will expand to include each of the fields.

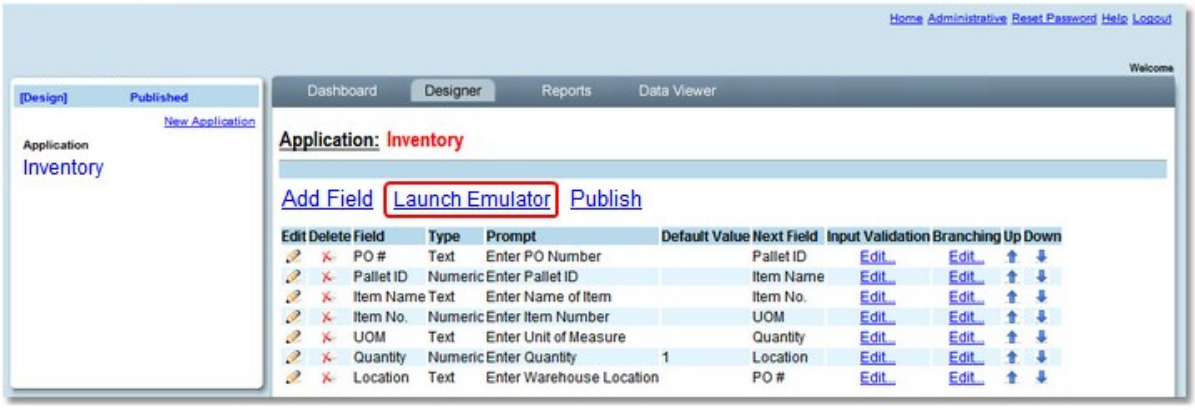




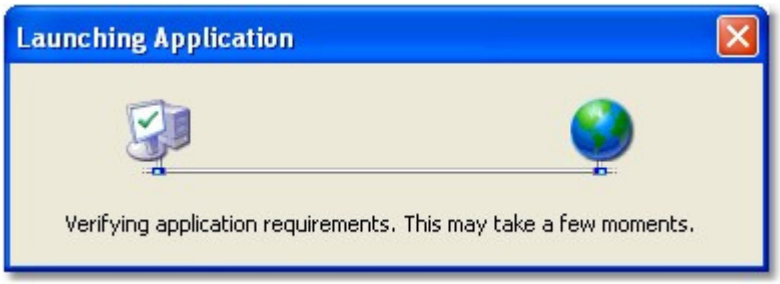
How to Launch the Emulator

After adding a **New Application**, click on the **Launch Emulator** link from the **Designer** view, as seen below. This feature enables you to **"validate"** the application you have just created.

Please Note: Although you will be entering data for **"testing"** purposes, no actual data is written in the **Emulator**.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Application
Inventory
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Branching Up Down
PO # Text Enter PO Number Pallet ID Edit... Edit...
Pallet ID Numeric Enter Pallet ID Item Name Edit... Edit...
Item Name Text Enter Name of Item Item No. Edit... Edit...
Item No. Numeric Enter Item Number UOM Edit... Edit...
UOM Text Enter Unit of Measure Quantity Edit... Edit...
Quantity Numeric Enter Quantity 1 Location Edit... Edit...
Location Text Enter Warehouse Location PO # Edit... Edit...

The **Launching Application** screen will be displayed.



Next, enter your **User ID** and **Password** and click on the **Login** button.

After logging in, the screens seen below will be displayed. Along the bottom of the screen is a **progress bar** showing that the Emulator is **Retrieving User Data** followed by **Loading App**. To the immediate right of these bars, you will find the **Version #**.

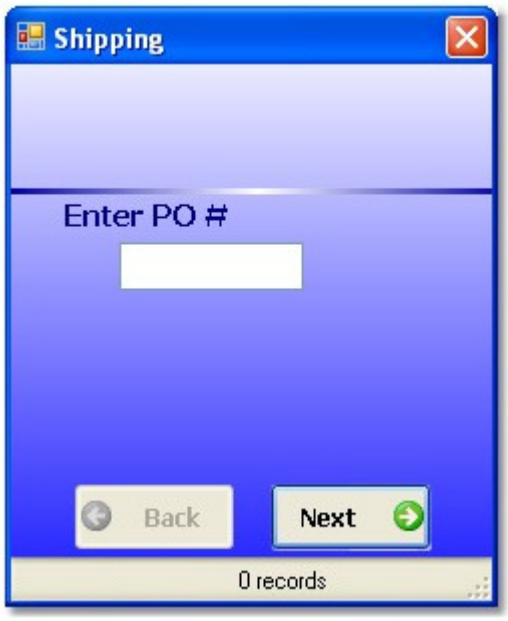
How to Enter Data into the Emulator

Once you have logged in, you will begin to enter data.

The **Emulator** screens generated will be determined by the **Fields** entered when designing the **Application** and will be displayed in the same order in which the **Fields** are arranged within the **Application**. In addition, any **Error Messages** generated will be based on the **Input Validation** values entered for each field.

Please Note: The following screen shots are **examples only**.

The **PO #** screen seen below requires a minimum entry of four characters. If less than four are entered, the **Error Message** seen here will be displayed. Enter the PO # in the correct format and then click on **Next** to advance to the next screen.

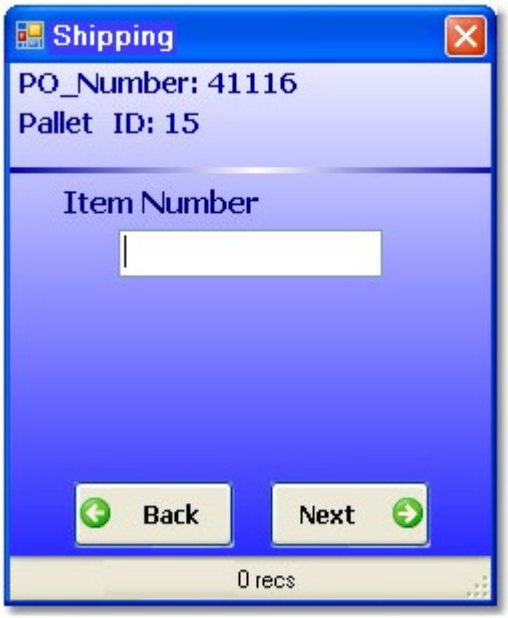


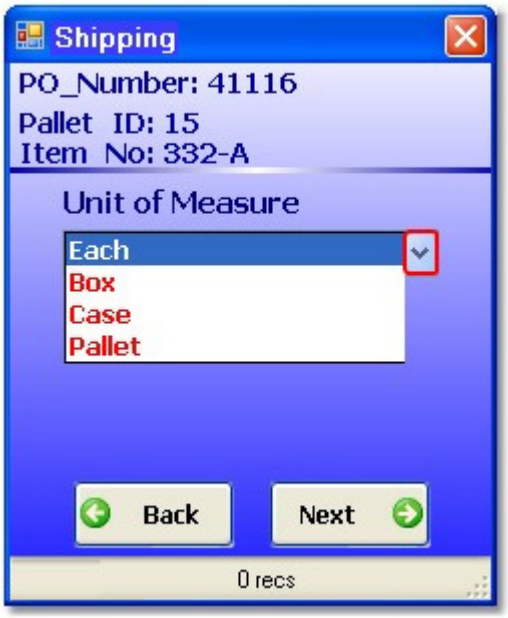
The **Pallet ID** screen, seen here, now contains the previously entered **PO Number**. Proceed by completing the **Pallet ID** field and then click on **Next** to continue. Once again, if data fails to meet the **Input Validation** requirements for this field, an **Error Message**, like the one seen below, will be generated.

The screen that follows now contains the **PO Number** and the **Pallet ID** number. Proceed by entering the **Item Number** and click on **Next** to advance or on **Back** to return to the previous screen.

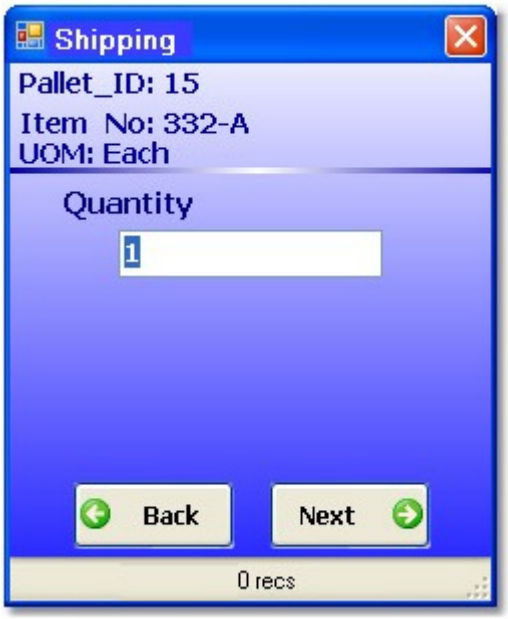
As with each of the prior screens, the **top portion** of the screen will contain the **Displays** that were established for each field when designing the application. The **Mobile Device** is capable of displaying up to **three Display Values**.

In this example, the **Unit of Measure** field, as seen in the second screen, utilizes a **drop down** list. Select the proper measurement for the **Item Number** entered on the preceding screen and click on **Next**.





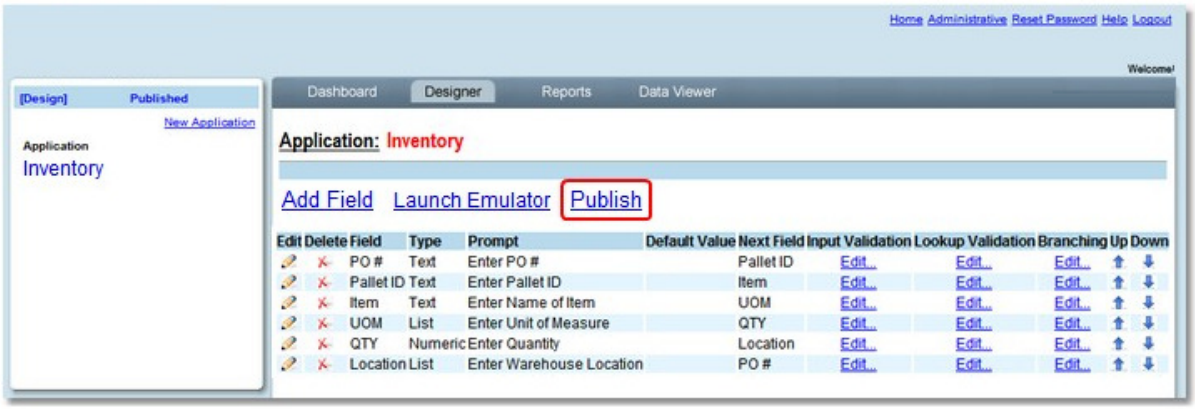
Continue by entering the **Quantity** and click on **Next**. You will **"loop"** back to the **Item Number** screen, where you can continue to enter additional items to this **Pallet ID** under the **same PO # or** enter a **new PO #**.



How to Publish an Application

After designing a **New Application**, click on the **Publish** link from the **Designer** view, as seen below.

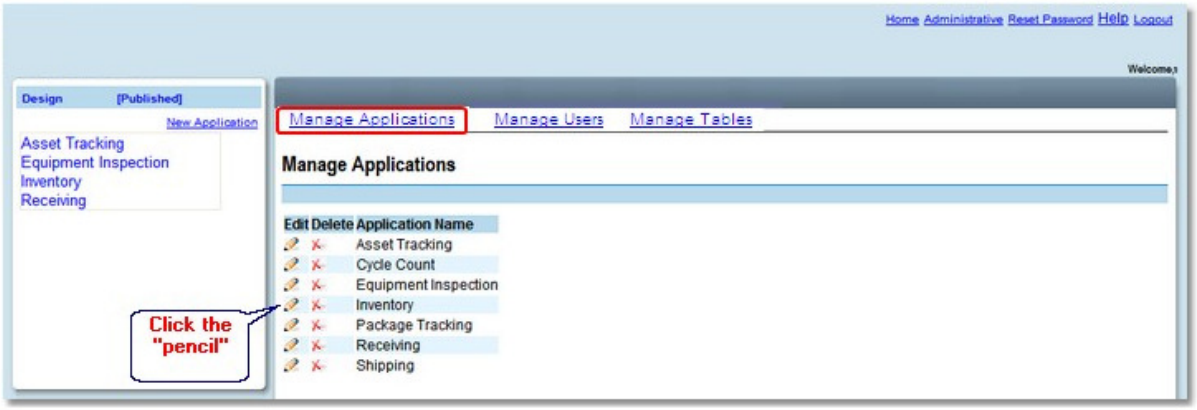
Please Note: Non-Administrative Users can only access **Published** applications.


Home Administrative Reset Password Help Logout
Welcome!
[Design] Published
New Application
Application
Inventory
Dashboard
Designer
Reports
Data Viewer
Application: Inventory
Add Field
Launch Emulator
Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...

You will be returned to the **Home Page**, where the newly published application will now be displayed under **Recent Activity**, as seen below.

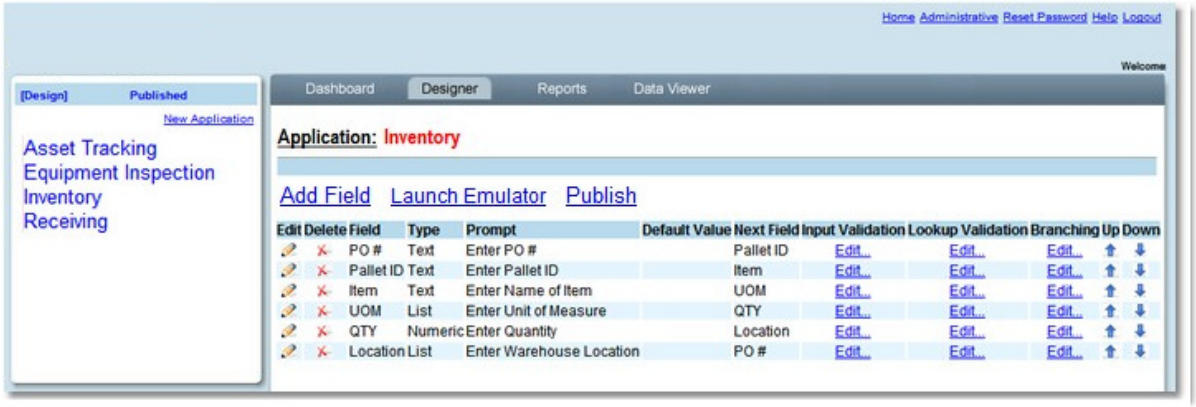
How to Edit an Application

From the **Manage Applications** screen, click on the **Pencil** icon to the left of the **Application** you wish to **edit**.



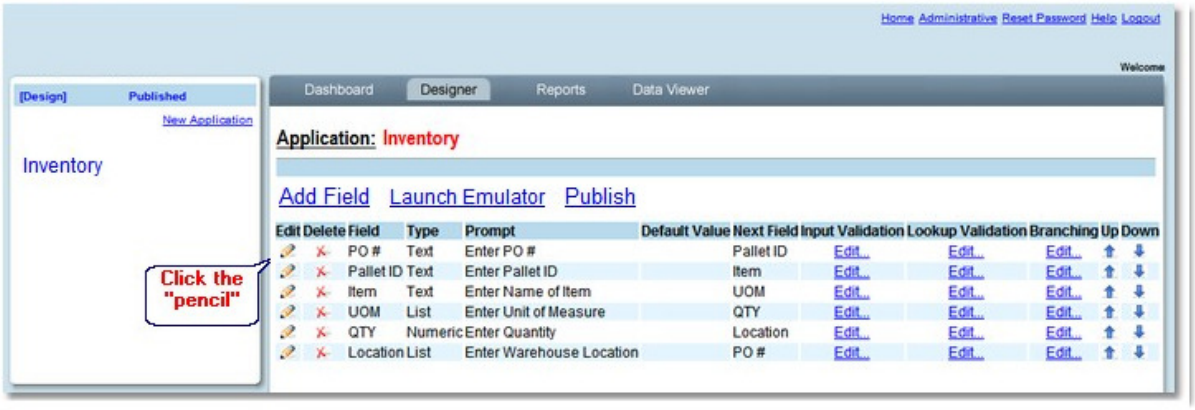
The screen seen below displays this **Application's** current information. For instructions on how to **edit** this data, click on the links that follow:

- **How to Edit a Field**
- **How to Delete a Field**
- **How to Edit Input Validation Parameters**
- **How to Edit Look-Up Validation Parameters**
- **How to Edit Branching Rules**
- **How to Rearrange Fields**

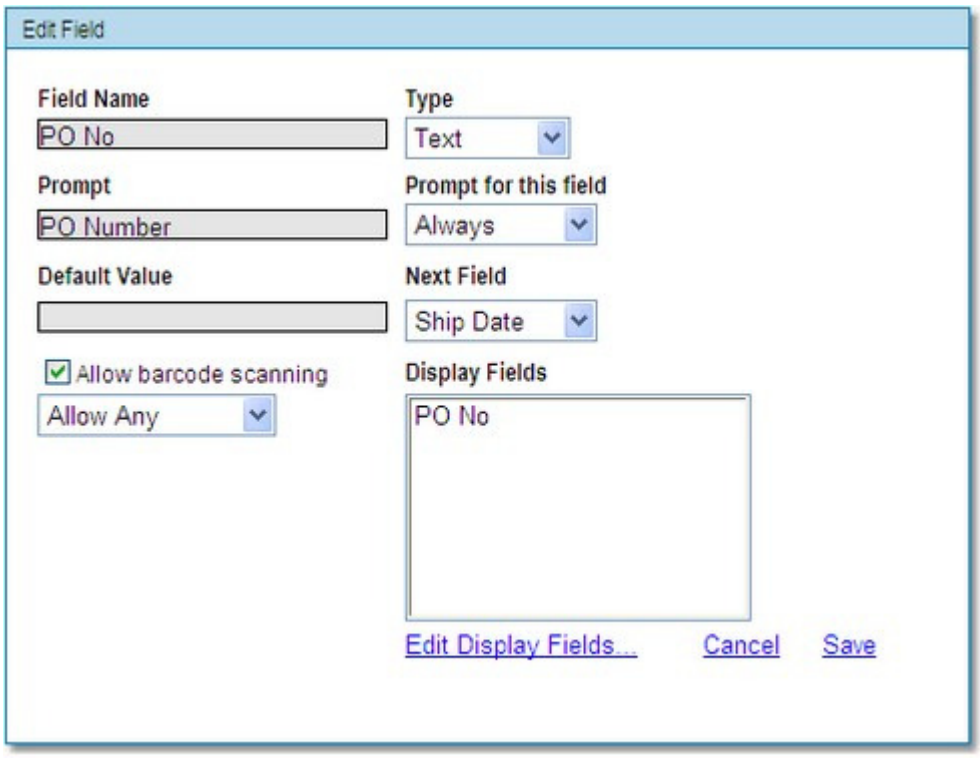

Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Asset Tracking
Equipment Inspection
Inventory
Receiving
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...

How to Edit a Field

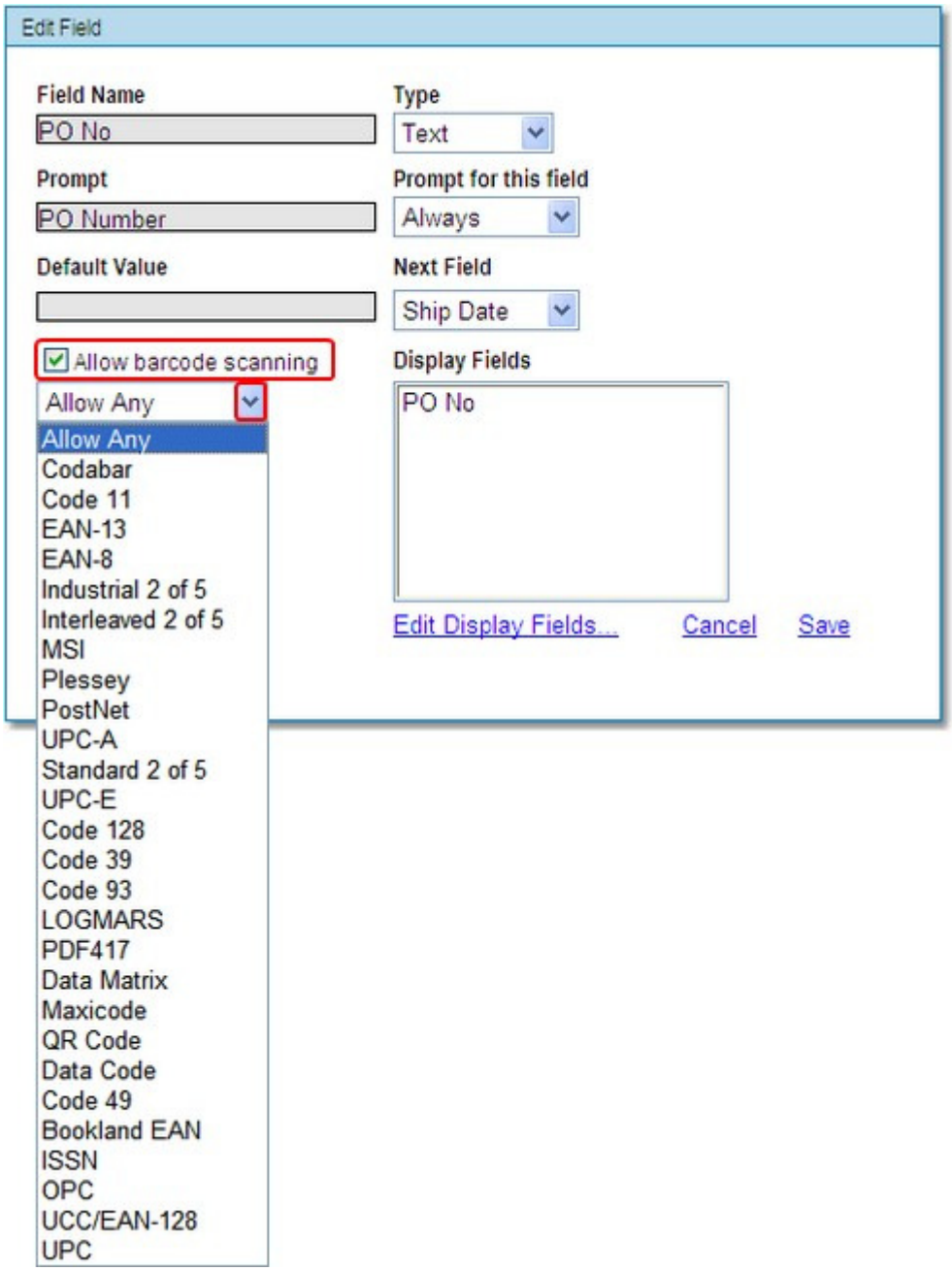
From the **Designer** view, begin by clicking on the **Pencil** icon to the left of the **Field** you wish to **edit**.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click the "pencil"

This will launch the **Edit Field** screen that follows.

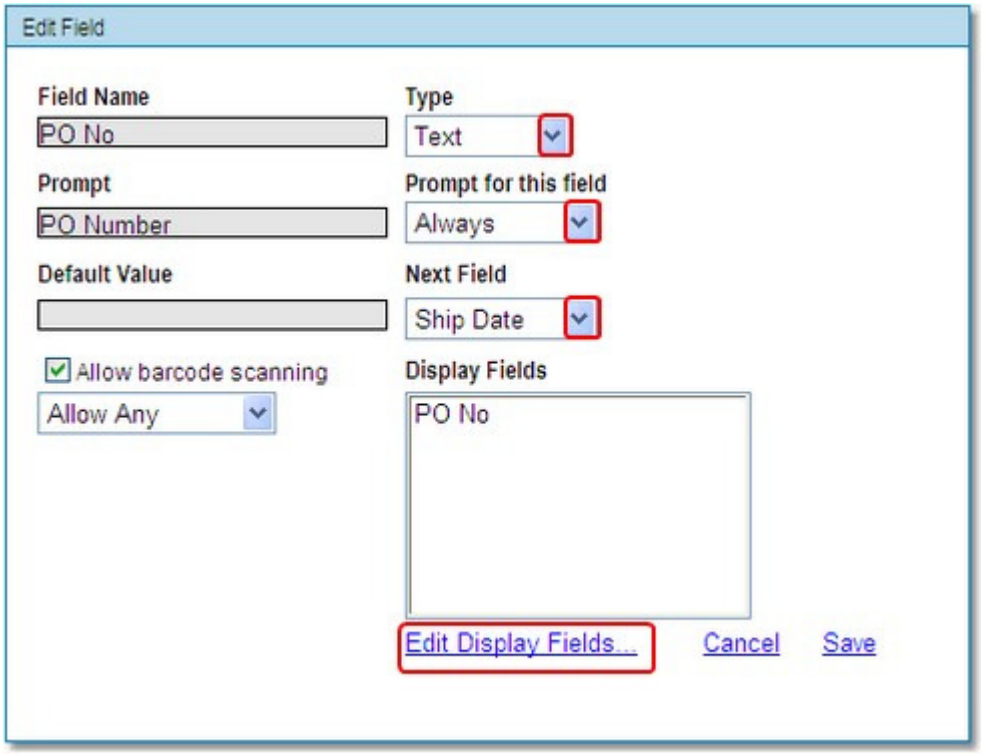


If you wish to **Allow Barcode Scanning**, place a **check mark** in the box to the left of the option and then click on the **drop down** arrow to select from the list of codes generated, as seen below.

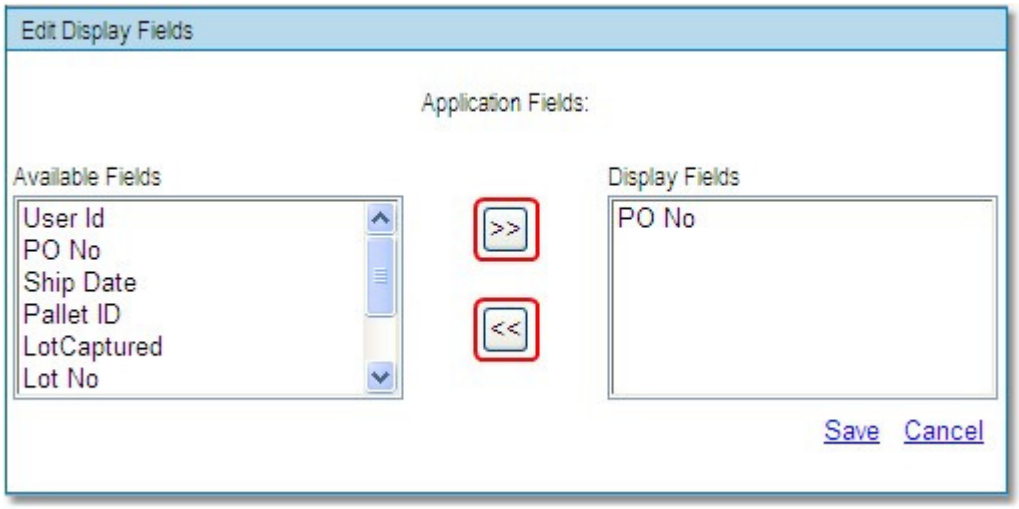


Proceed by modifying the **text boxes**, as needed, and use the **drop down** lists to make new selections for the **Type**, **Prompt**, and **Next** fields.

Next, click on **Edit Display Fields**.



At the screen seen below, use the **right arrow** to assign **Display Field** values from the list of available fields. If necessary, use the **left arrow** to remove a Display Field. The values assigned here will determine the fields that will be displayed on the **Mobile Device** at each of the screens within the application.

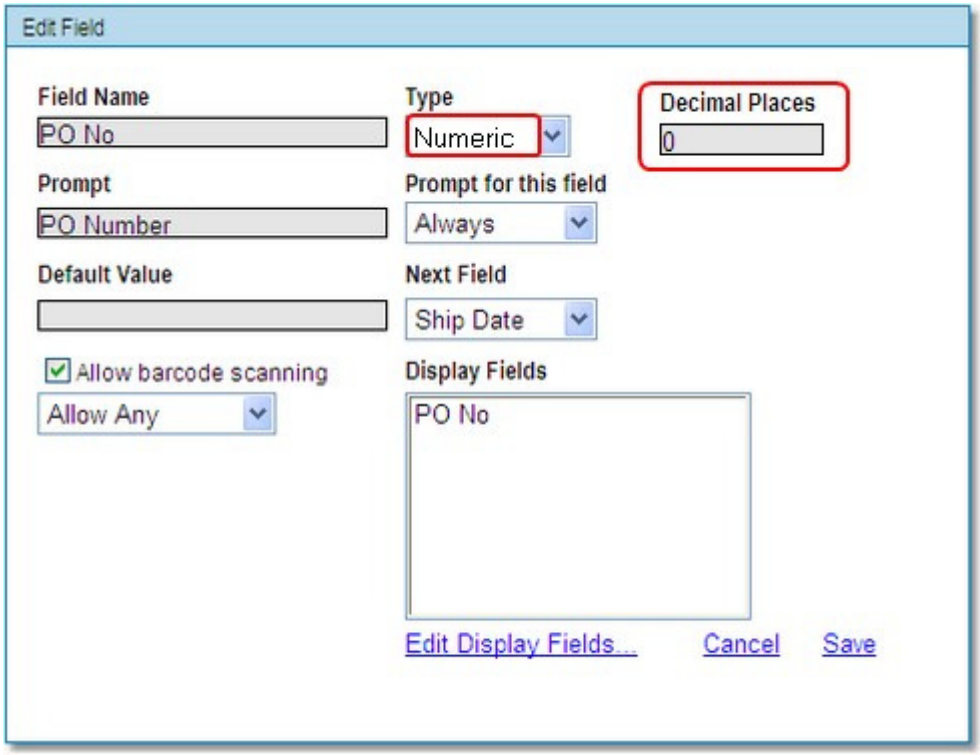


Please Note:

When the **Type** for a **newly added field** is a **List**, it will require **editing** in order to enter the **List Items**.

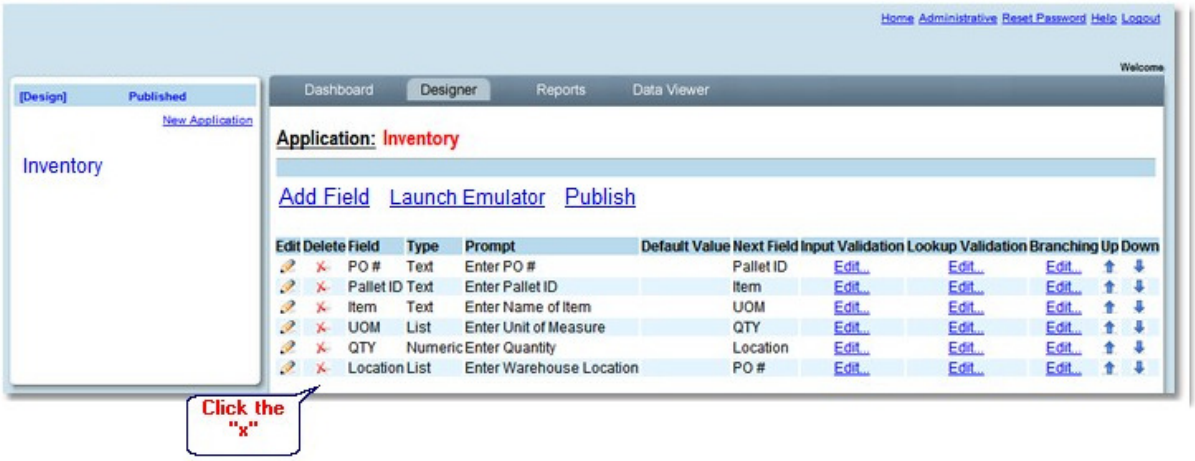
Clicking on the **Edit List Items** link, as seen below, will generate the **Manage List Items** screen, where you will **enter each item** in the space provided and then click on **Done**.

When the **Type** for a **newly added field** is **Numeric**, you can specify the **number** of **decimal places** when **editing**, as illustrated in the screen that follows.

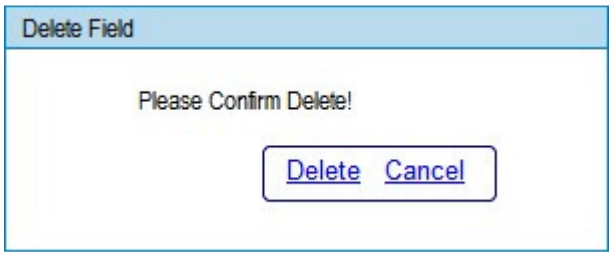


When you are satisfied with the changes made on the **Edit Field** screen, click on **Save** or click on **Cancel** to retain the original settings.

From the **Designer** view, begin by clicking on the **"x"** to the left of the **Field** you wish to **delete**, as seen below.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click the "x"

The **Delete Field** screen will be displayed. Click on **Delete** to proceed or on **Cancel** to abort this action.

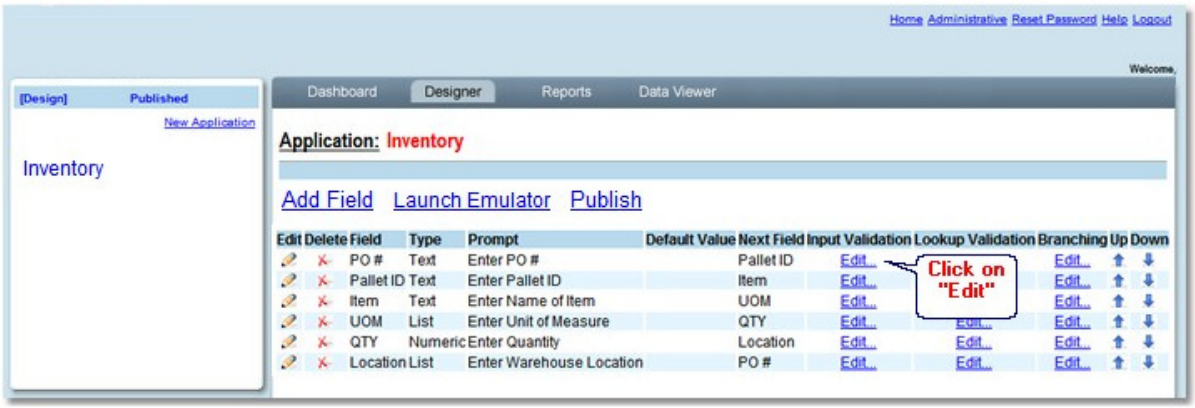


Please Note:
When fields are **deleted**, it is important that you verify that the **"Next"** prompt and the **"Branching Rules"** for the field **preceding** the **deleted** field are still valid.

How to Edit Input Validation Parameters

From the **Designer** view, begin by clicking on **Edit** under the **Input Validation** column for the **Field** you wish to **edit**, as seen below.

Please Note: The **"Edit"** link will be displayed for **all** Fields entered; however, it can only be used to validate **Text** or **Numeric** Data Types.

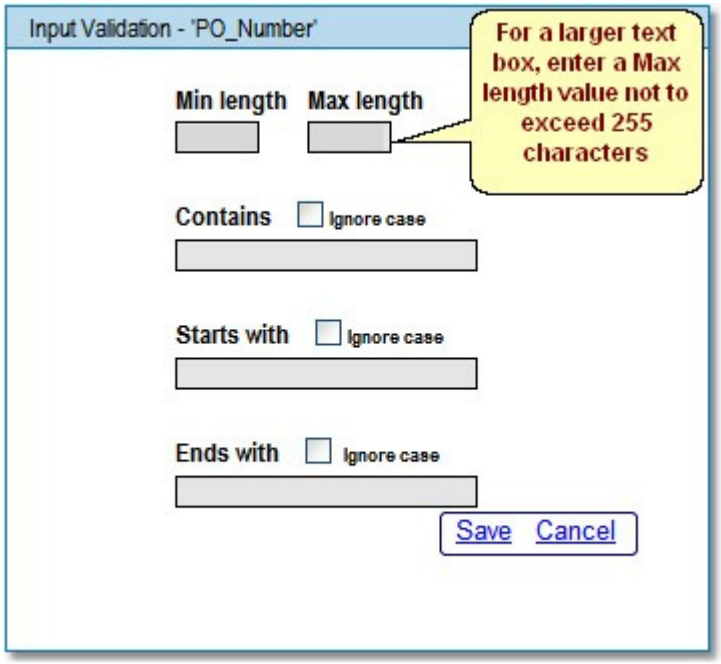

Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard Designer Reports Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click on "Edit"

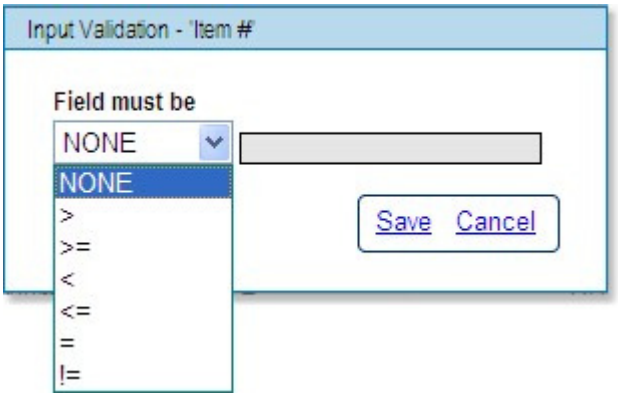
An **Input Validation** screen will be displayed for the **Text** or **Numeric Data Type** selected, as illustrated by the following two screens respectively.

Please Note: If you wish to implement a text box that is **larger** than the default text box in order to capture comments or additional information, specify a **Max length** value that is greater than a single line's character length (measured using the current font). This Max length value cannot exceed **255 characters**.

Also Note: Samples of the default text box as well as one with a Max length value of 255, as viewed on the **Emulator**, can be found at the bottom of this screen.

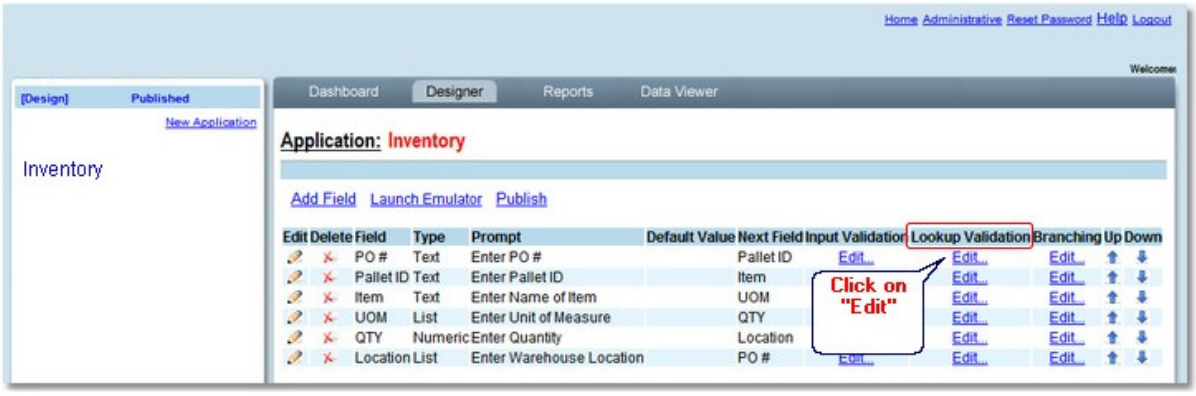
Continue by entering the **Validation Parameters** and click on **Save** or click on **Cancel** to abort this action.





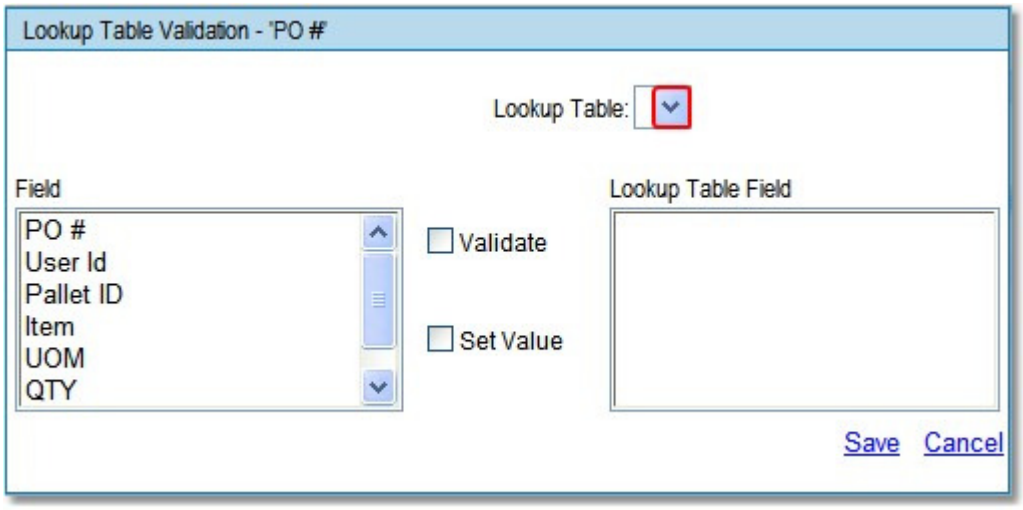
How to Edit Look-Up Validation

From the **Designer** view, begin by clicking on **Edit** under the **Lookup Validation** column for the **Field** you wish to **edit**, as seen below.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard
Designer
Reports
Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click on "Edit"

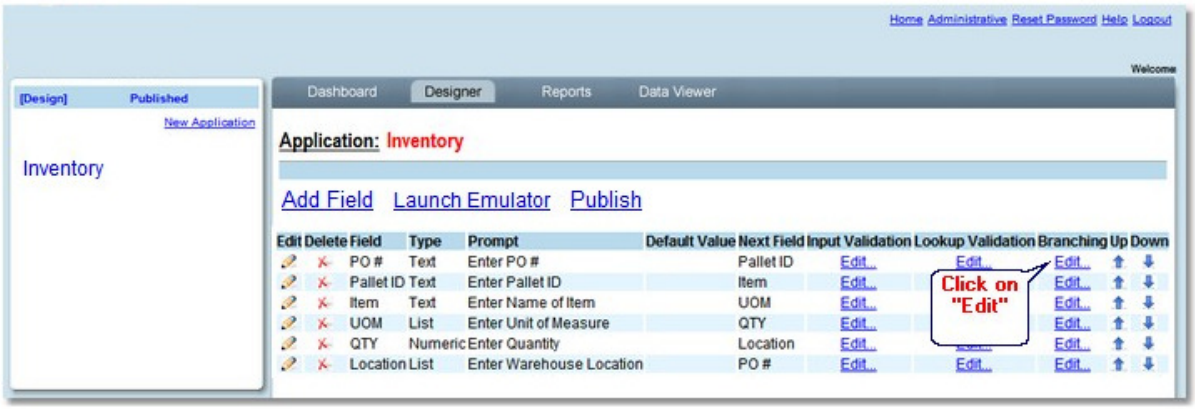
At the screen seen below, modify the validation parameters as needed, to include selecting a new **Lookup Table**, if necessary.

When satisfied with your changes, click on **Save** or on **Cancel** to retain the current settings.



How to Edit Branching Rules

From the **Designer** view, begin by clicking on **Edit** under the **Branching** column for the **Field** you wish to **edit**, as seen below.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard
Designer
Reports
Data Viewer
Application: Inventory
Add Field
Launch Emulator
Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID Edit... Edit... Edit...
Pallet ID Text Enter Pallet ID Item Edit... Edit... Edit...
Item Text Enter Name of Item UOM Edit... Edit... Edit...
UOM List Enter Unit of Measure QTY Edit... Edit... Edit...
QTY Numeric Enter Quantity Location Edit... Edit... Edit...
Location List Enter Warehouse Location PO # Edit... Edit... Edit...
Click on "Edit"

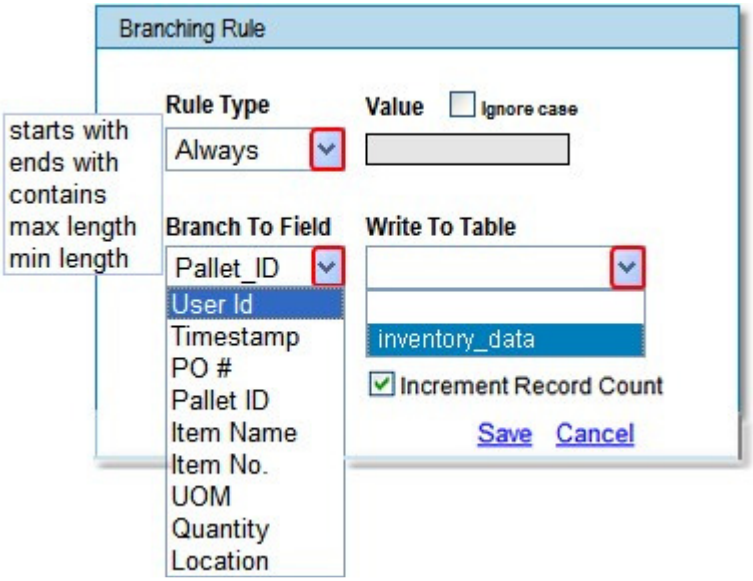
This will launch the following screen, which allows you to **Edit** or **Delete** this **Branching Rule**.

To **Edit**, click on the **Pencil** icon to the left of the **Rule** you wish to **edit**, as seen in the first screen below.

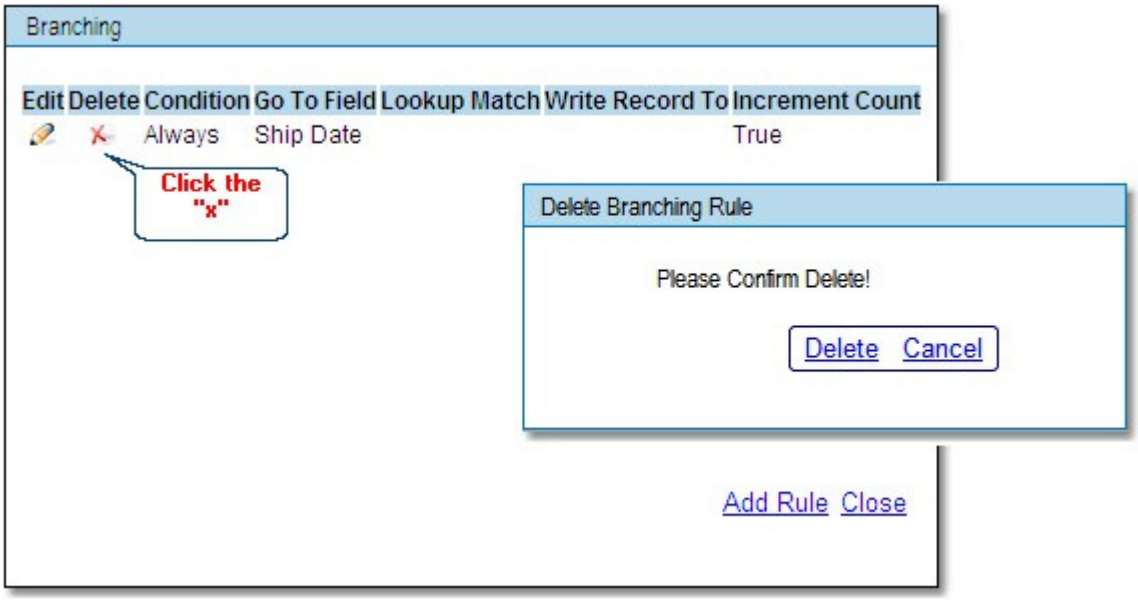
Branching
Edit Delete Condition Go To Field Lookup Match Write Record To Increment Count
Always Ship Date True
Click the "pencil"
Add Rule Close

The **Branching Rule** screen will now be displayed. Proceed by using the **drop down** lists to edit the **Type** and **Branch To Field** and use the **text box** to enter a **Value**, if needed. When all changes have been made, click on **Save** or on **Cancel** to abort this action.

> **Please Note:** Under normal circumstances, the **Write Record To** field remains blank until adding the **Branching Rule** for the **last prompt** before the application **"loops"** back to the beginning. If more than just the **"default" table** has been defined, the data **can** be written to **multiple tables**, but **not** for the **same** Branching Rule.



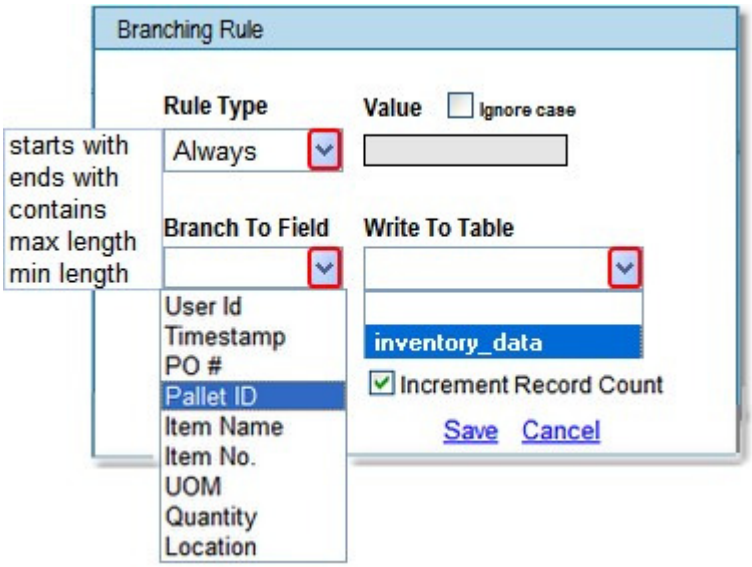
To **Delete**, click on the **"x"** to the left of the **Rule** you wish to **delet**e, as seen below. This will launch the **Delete Branching Rule** screen, where you will click on **Delete** to proceed or on **Cancel** to abort the deletion.



If you wish, **Multiple Rules** can be assigned to each field. Click on the **Add Rule** link found in the lower right corner of the screen, as seen below.

Branching
Edit Delete Condition Go To Field Lookup Match Write Record To Increment Count
Always Ship Date True
Add Rule Close

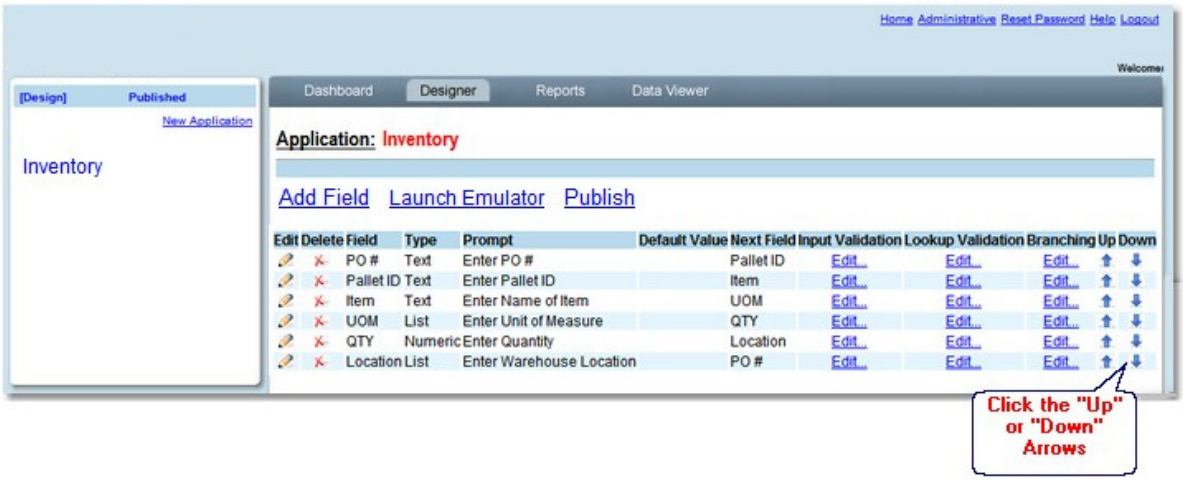
The **Branching Rule** screen will now be displayed. Proceed by using the **drop down** lists to select the **Type** and **Branch To Field** and complete the **Value** text box, if needed. When all fields have been populated, click on **Save** or on **Cancel** to abort this action.



How to Rearrange Fields

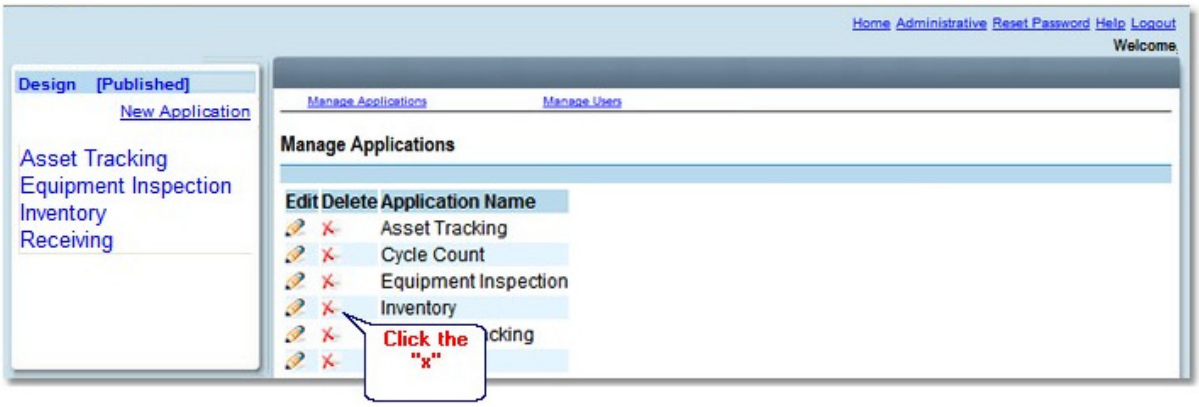
To perform this function, click on the **"Up"** or **"Down"** arrows to the right of the **Field** you wish to rearrange, as seen below.

Please Note: When fields are **rearranged**, it is important to verify that the **"Next"** prompt and the **"Branching Rules"** for the fields **preceding** and **following** the **rearranged** field are still valid.


Home Administrative Reset Password Help Logout
Welcome
[Design] Published
New Application
Inventory
Dashboard
Designer
Reports
Data Viewer
Application: Inventory
Add Field Launch Emulator Publish
Edit Delete Field Type Prompt Default Value Next Field Input Validation Lookup Validation Branching Up Down
PO # Text Enter PO # Pallet ID
Pallet ID Text Enter Pallet ID Item
Item Text Enter Name of Item UOM
UOM List Enter Unit of Measure QTY
QTY Numeric Enter Quantity Location
Location List Enter Warehouse Location PO #
Edit...
Click the "Up" or "Down" Arrows

How to Delete an Application

From the **Manage Applications** screen, click on the **"x"** to the left of the **Application** you wish to **delete**, as seen below.



The **warning** seen below will be displayed. Click on **Delete Application** to proceed or on **Cancel** if you wish to abort this action.

Delete Application!
WARNING!!!
Are you sure you want to permanently delete 'Inventory'? This will delete the entire application including all data and reports.
Cancel Delete Application

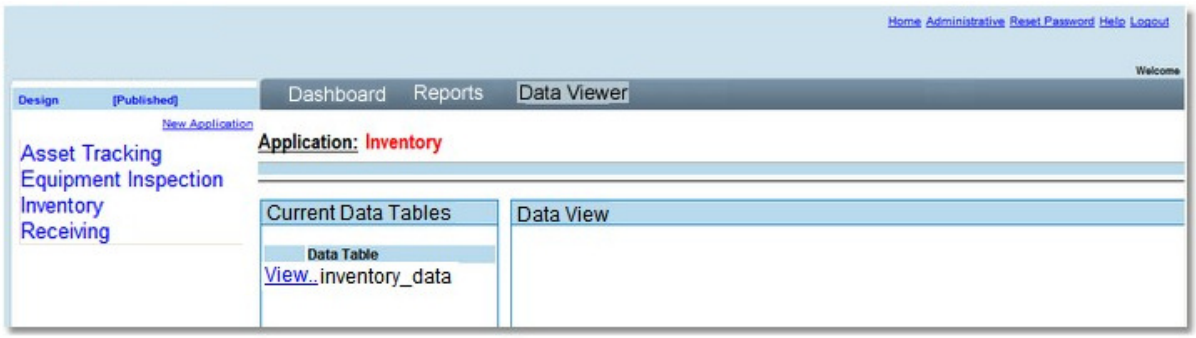
Managing Data Tables

From either the **Design or Published** view, as seen below, select an application.

This will launch the **Dashboard** view, as seen in the following screen. Proceed by clicking on **Data Viewer**.

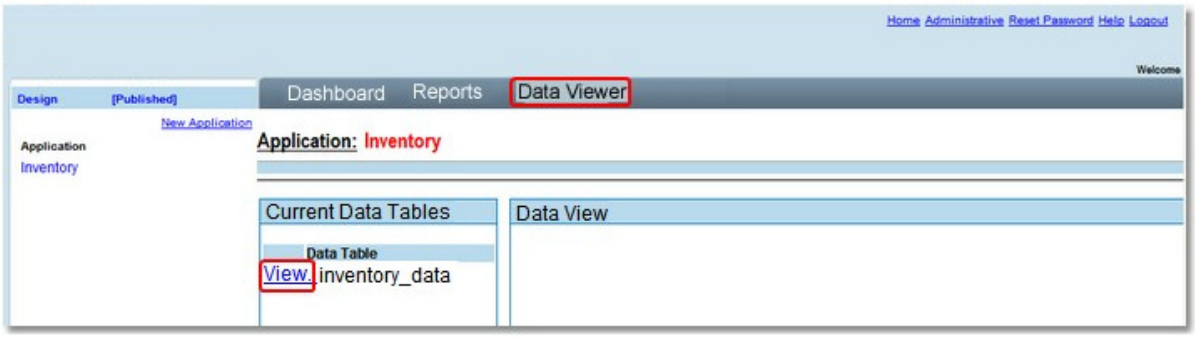
Please Note: If an application is selected from the **Design** view, the **Designer** tab will be contained within the Dashboard.

The screen seen below contains a summary of the **Current Data Tables** in the left column and a **Data View** in the right column.

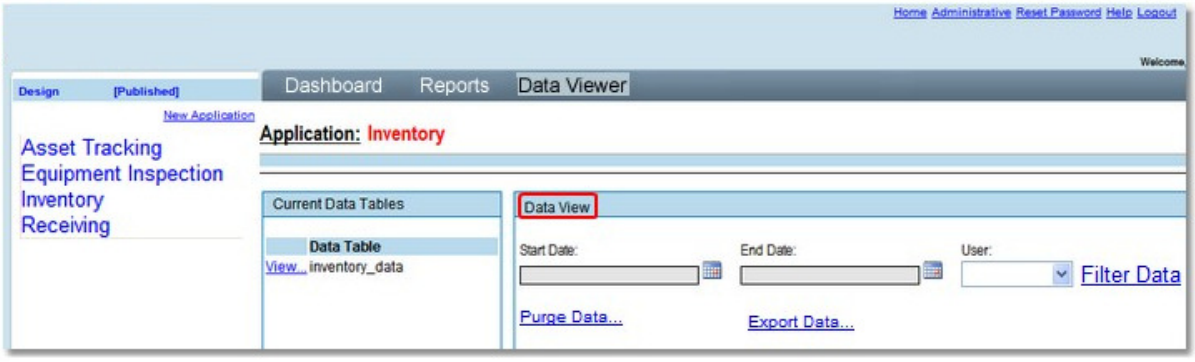


How to View a Data Table

From the **Data Viewer** screen, click on **View** to the left of the **Data Table** you would like displayed.



Doing so will populate the **Data View** column on the right side of the screen, as seen below.



From within this view, you can **Filter**, **Purge**, or **Export Data**.

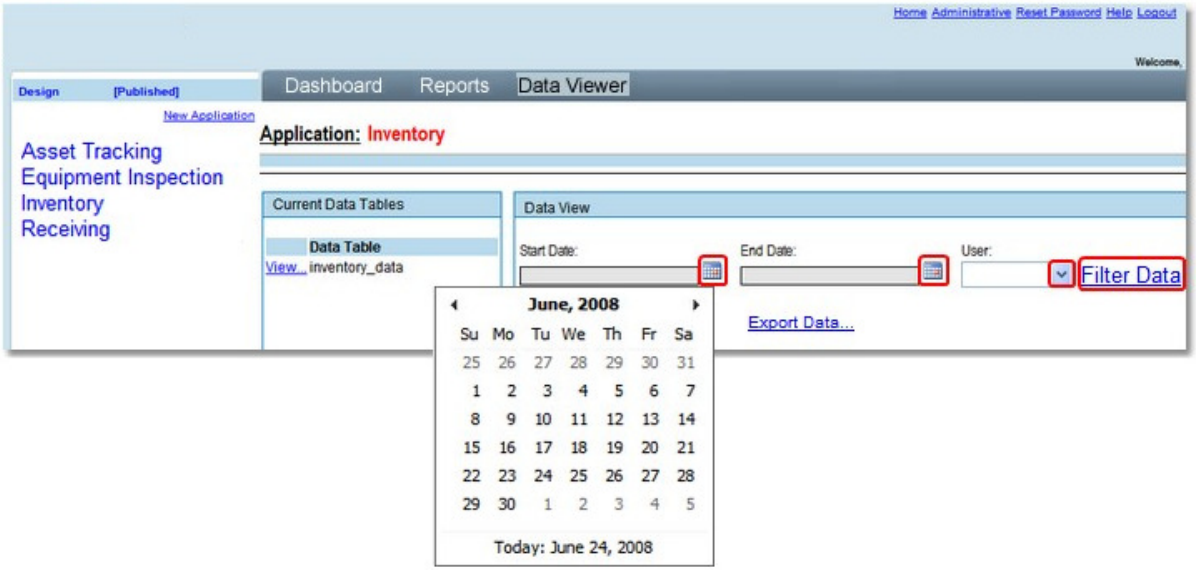
For instructions on completing these functions, click on the links that follow:

- **How to Filter Data**
- **How to Purge Data**
- **How to Export Data**

How to Filter Data

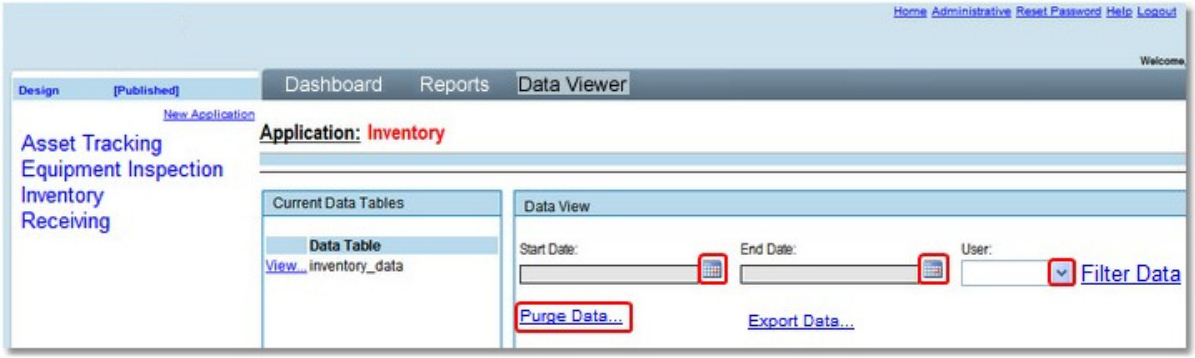
To **Filter Data**, begin by entering a **Start Date** under the **Data View** column. If necessary, click on the icon to the immediate right of this field to display a **calendar**, as seen below.

Proceed by entering an **End Date** and then use the **drop down** list to select a **User**. When all information is complete, click on **Filter Data**.

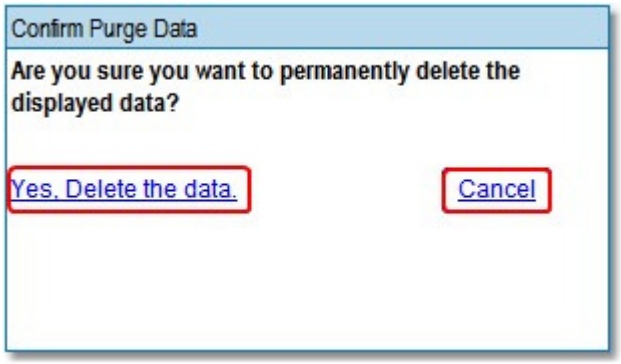


How to Purge Data

To **Purge Data**, complete the **Start Date**, **End Date**, and **User** fields under the **Data View** column and then click on **Purge Data**.

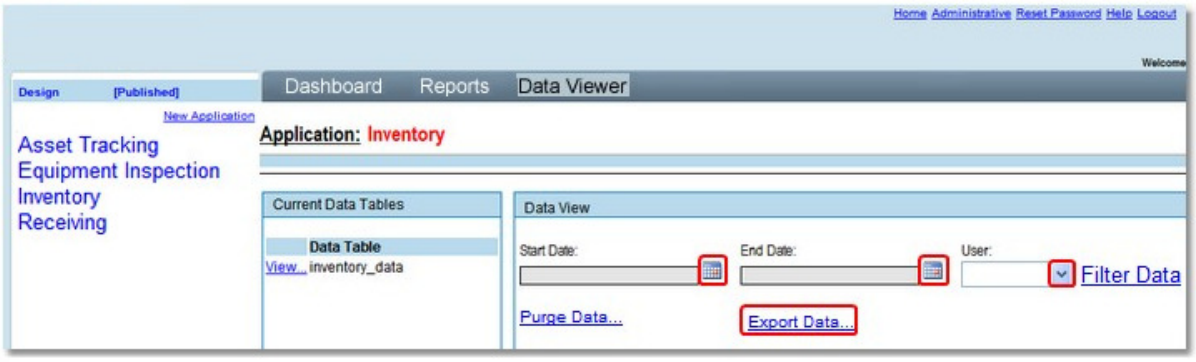


The following screen will serve as confirmation. Click on **Yes** to proceed or on **Cancel** to abort this action.

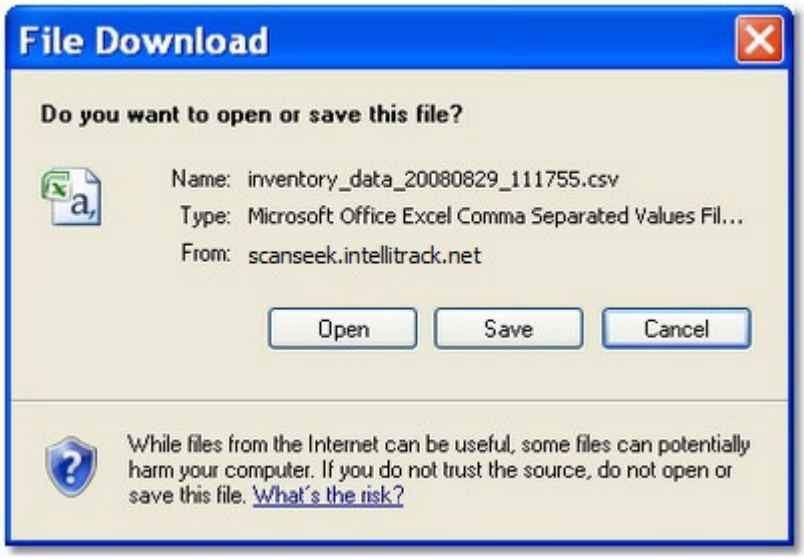


How to Export Data

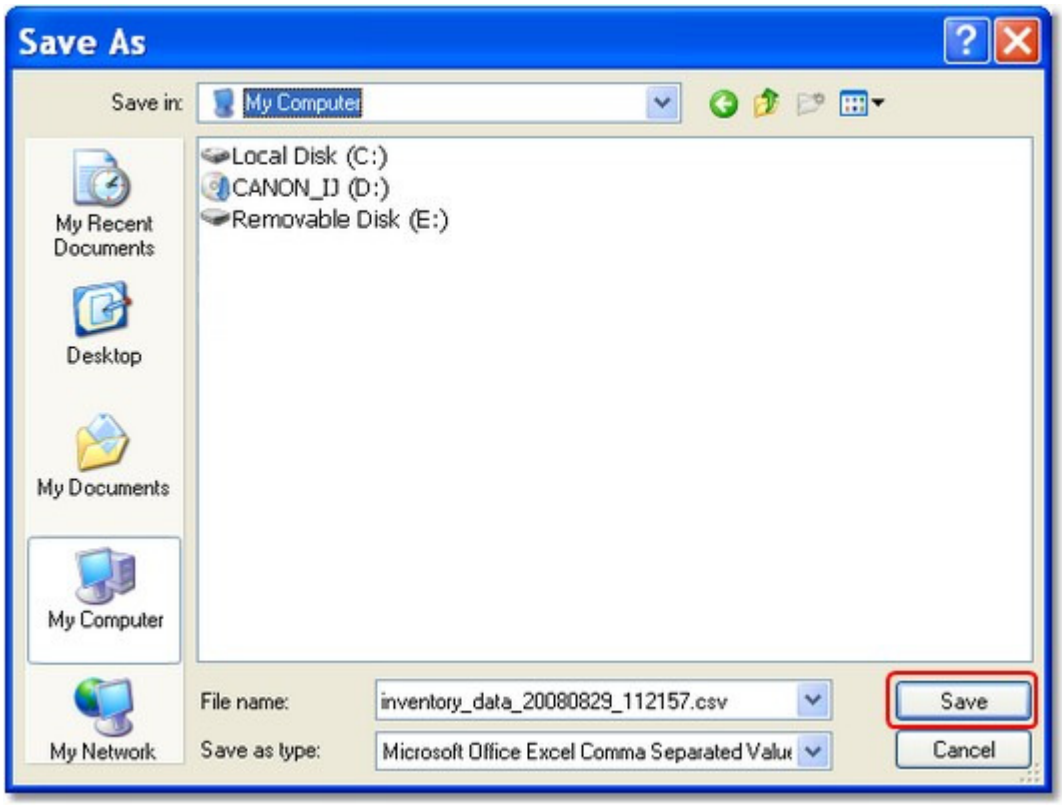
To **Export Data**, complete the **Start Date**, **End Date**, and **User** fields under the **Data View** column and then click on **Export Data**.



The **File Download** screen, seen below, will be displayed. Click on **Open** to view the file or on **Save** to place the document on your PC.


File Download
Do you want to open or save this file?
Name: inventory_data_20080829_111755.csv
Type: Microsoft Office Excel Comma Separated Values Fil...
From: scanseek.intellitrack.net
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Saving the file will launch the screen that follows. Determine a location where you wish the file to reside and click the **Save** button.



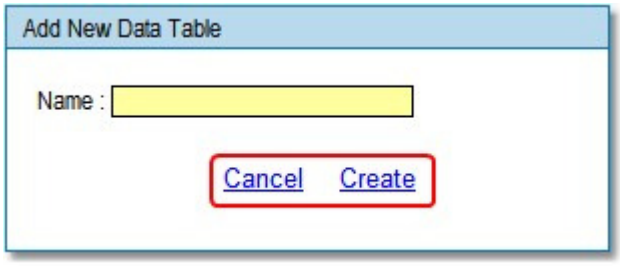
How to Create a Data Table

From the **Design** view, seen below, select an application.

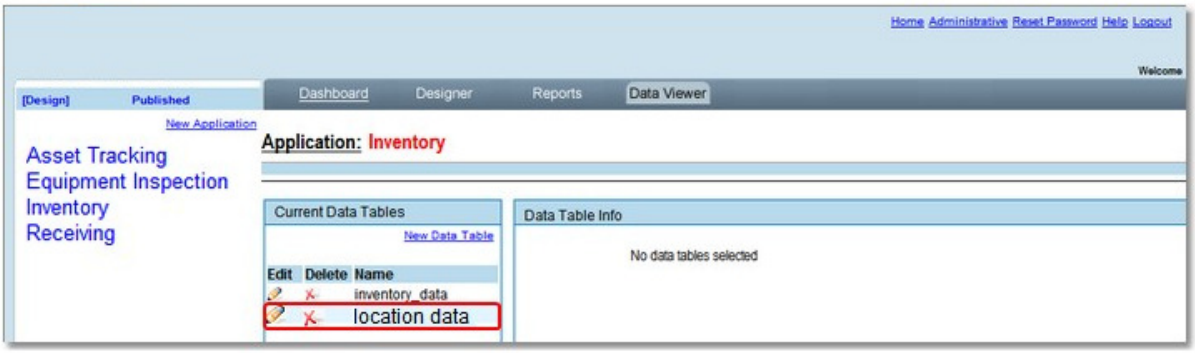
This will launch the **Dashboard** view, where you will click on the **Data Viewer** tab.

At the **Data Viewer** screen, click on **New Data Table** under the **Current Data Tables** column, as seen in the following screen.

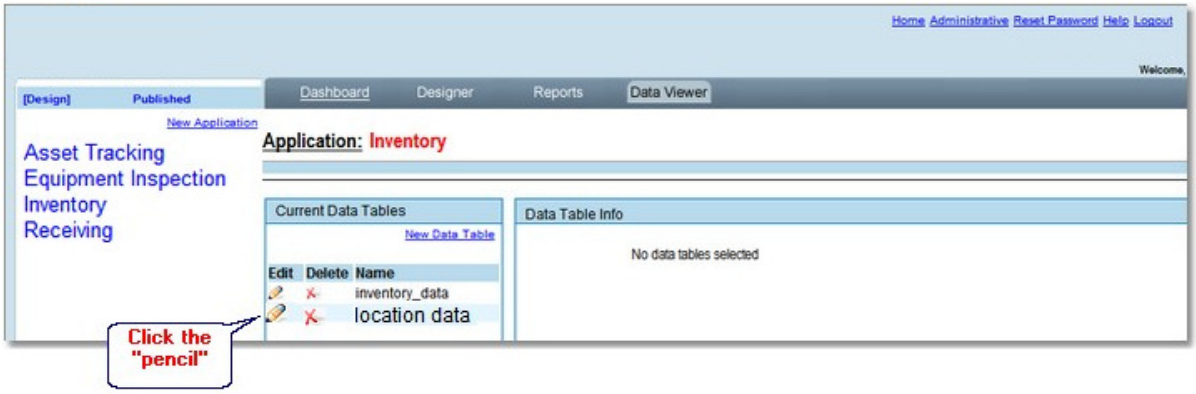
Proceed by entering a **Name** for the table and then click on **Create** or on **Cancel** to abort the table addition.



Once the table has been created, it will be displayed under the **Current Data Tables** column.

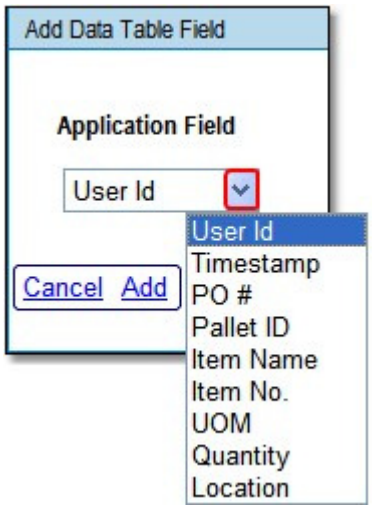


To add data, click on the **Pencil** icon to the left of the table you wish to populate, as seen below.



The **Data Table Info** column on the right, as seen in the following screen, will now display details for the table chosen. Proceed by clicking on **Add Field**.

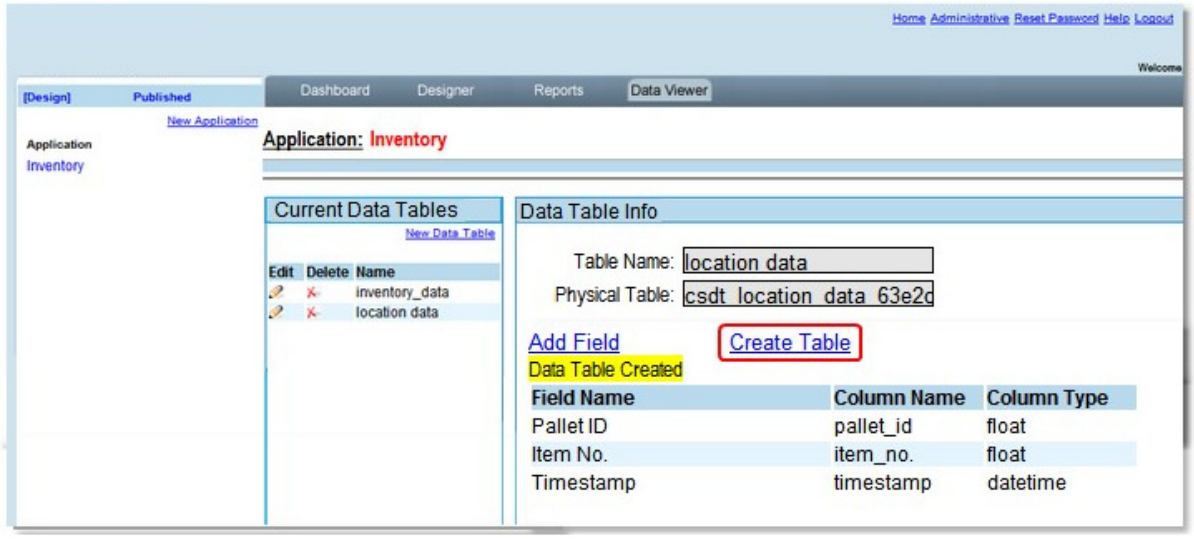
At the **Add Data Table Field** screen, select the **Application Field** using the **drop down** list and then click on **Add** or on **Cancel** to abort this action.



You will now see the newly added field, as shown in the following screen.

Proceed to add additional fields to this **Data Table**, as needed, and then click on **Create Table**, as shown in the following screen.

The "Data Table Created" message will now be displayed.



Managing Reports

From either the **Design or Published** view, seen below, select an application.

From the **Dashboard** view, click on **Reports**, as seen below.

Please Note: If you select an application from the **Design** view, the Dashboard will contain the **Designer tab** in

addition to the tabs seen in the following screen.

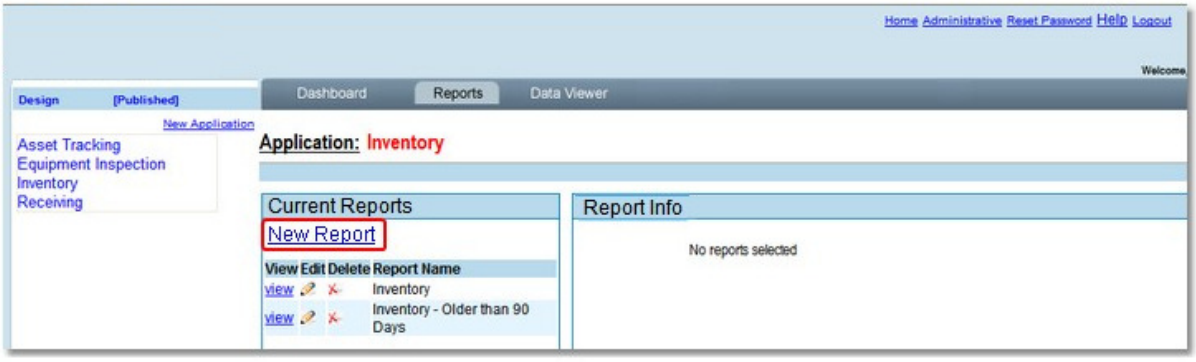
The following screen will be displayed, which contains a list of **Current Reports** and **Report Info**. From here, you can **Create**, **Edit**, or **Delete** a Report.

For instructions on completing these functions, click on the links that follow:

- How to Create a New Report
- How to Edit a Report
- How to Delete a Report

How to Create a New Report

From the **Reports** view, click on **New Report** under the **Current Reports** column.



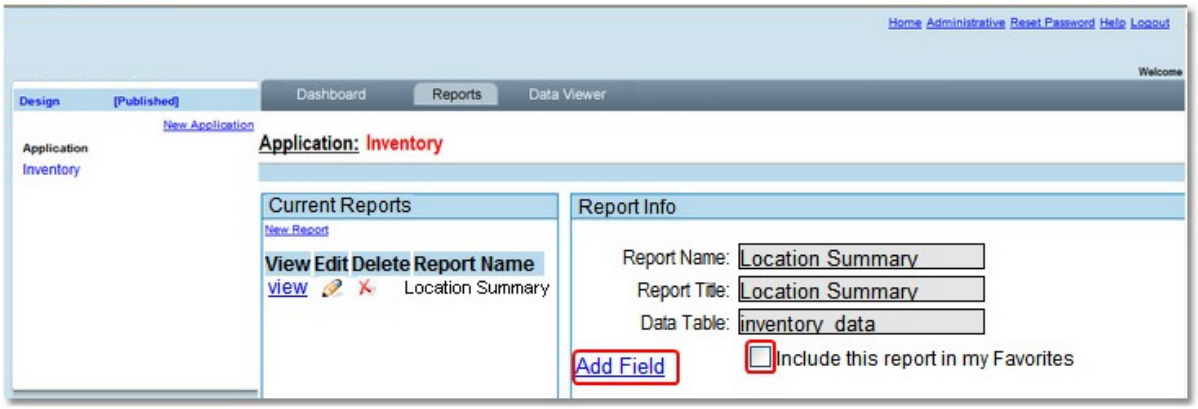
This will launch the **Add New Report** screen that follows. Enter a **Name** and then select a **Table** using the **drop down** list. Click on **Create** or on **Cancel** to abort this action.

Please Note: If this new report is similar to one of the current reports listed, you may wish to place a **check mark** in the box to the immediate left of the **Create a default report** notation, as shown in the screen that follows. This feature enables you to modify an existing report's fields vs. creating a new report from scratch by adding each individual field.

Your newly created report will now be listed under the **Current Reports** column with details under the **Report Info** column, as seen below. Proceed by clicking on the **Add Field** link.

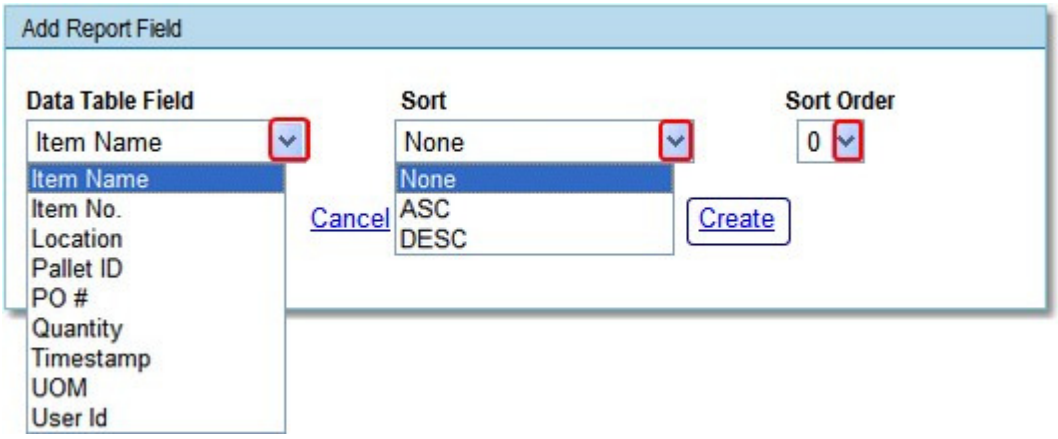
Please Note: If you wish to include this new report under your list of **Favorites**, place a **check mark** in the box to the immediate left of the notation. This option is only available when creating reports in the **[Published]** view.

Also Note: If you chose to **create a default report**, as discussed above, your new report will be pre-populated with all of the fields contained within the default report. You will then proceed with **editing** the existing fields or **adding** new fields to the report, as instructed below.



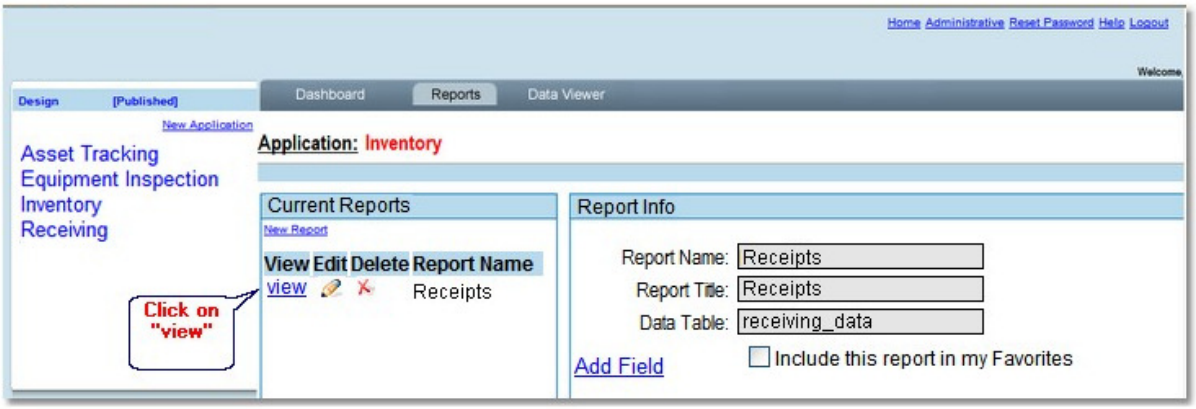
The **Add Report Field** screen will be displayed where you will use the **drop down** lists to select a **Data Table Field**, **Sort** parameter, and **Sort Order** for the new field. Click on **Create** to proceed or on **Cancel** to abort this action.

You will be returned to the previous screen, where you will click on **Add Field** to continue adding fields to this report.



How to View a Report

From the **Reports** view under the **Current Reports** column, click on **"view"** to the left of the **Report** you want to display, as seen below.



Doing so will launch a **new window** that contains the following information:

- **Name** of the Report
- **Date** and **Time** of the Report
- All Report **Fields**

Simply close the window to return to the **Reports** screen.

Receipts

7/10/2008 3:29:08 PM

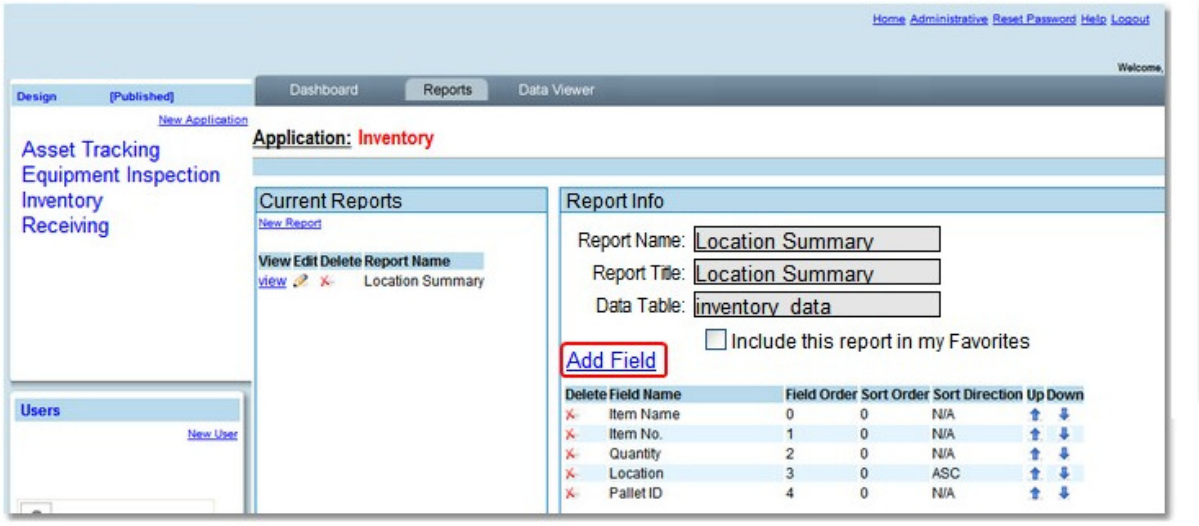
PO	PalletID	ItemNo	UOM	Qty	User Id	Timestamp
1234	1234	1234	EACH	1	janedoe@domain.com	2/26/2005 6:26:31 PM
13	258	369	BOX	1	janedoe@domain.com	11/1/2003 3:54:02 AM
2585	1235	258	EACH	1	janedoe@domain.com	11/1/2003 3:47:55 AM
33	22	11		2	janedoe@domain.com	2/26/2005 6:26:30 PM
PO3222	23456	444444	PALLET	5	janedoe@domain.com	7/3/2008 7:47:28 AM
PO666	12345	333	CASE	3	janedoe@domain.com	7/2/2008 4:26:58 PM
PO666	12345	999	EACH	1	janedoe@domain.com	7/2/2008 4:26:02 PM
PO666	12345	4444	PALLET	4	janedoe@domain.com	7/2/2008 4:27:17 PM
PO666	12345	22222	BOX	1.5	janedoe@domain.com	7/2/2008 4:26:37 PM

How to Edit a Report

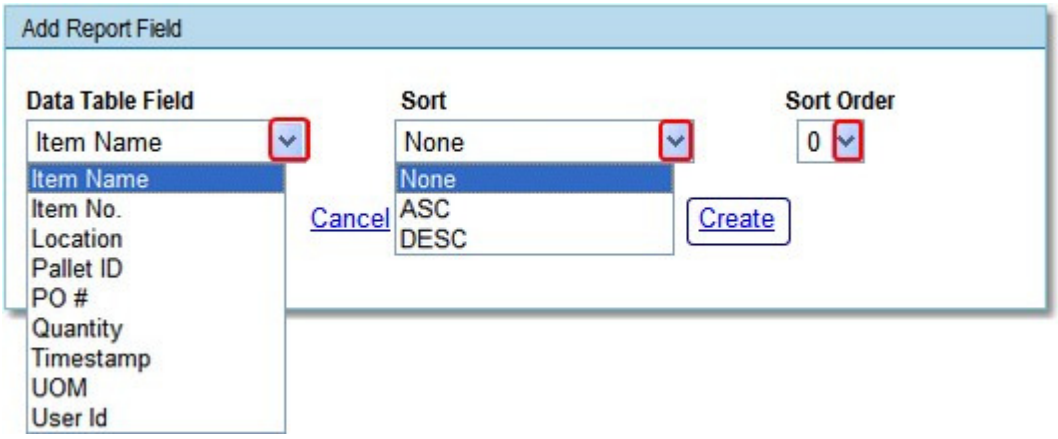
From the **Reports** view under the **Current Reports** column, click on the **Pencil** icon to the left of the **Report** you wish to **edit**, as seen below.

Doing so will populate the **Report Info** column, as seen in the screen that follows.

To incorporate **additional** fields into this report, click on **Add Field**.



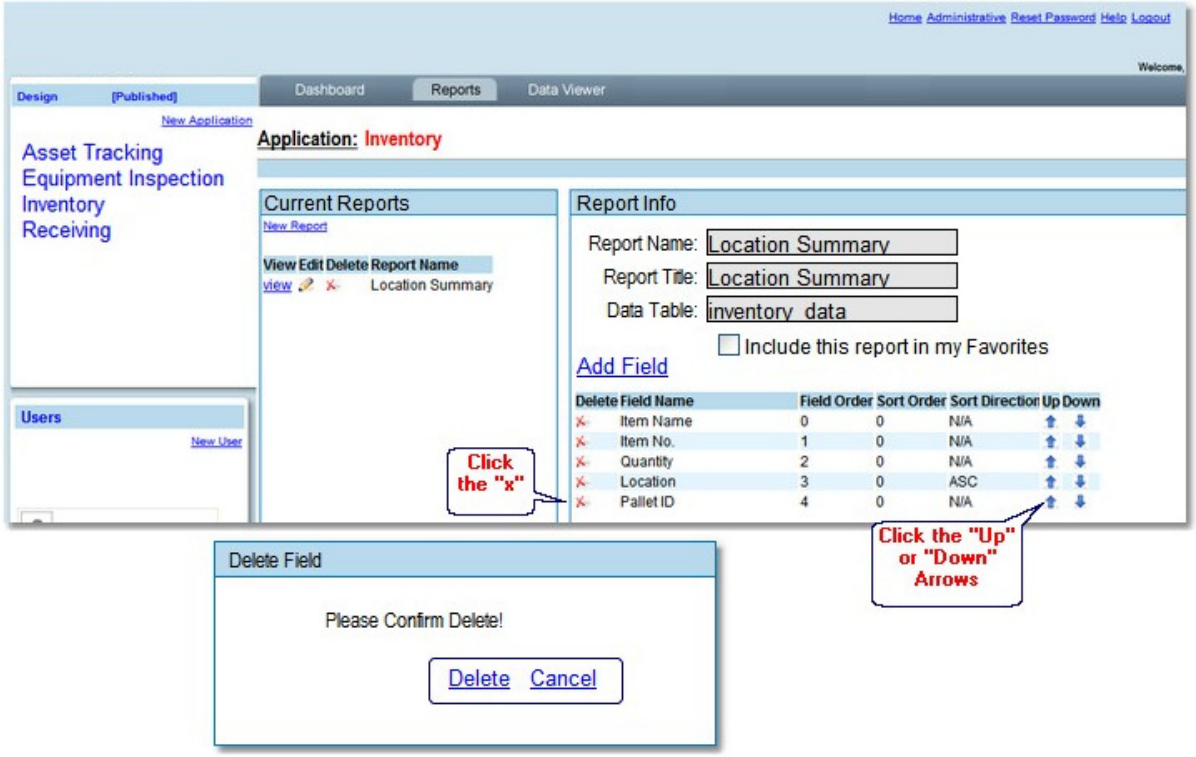
The **Add Report Field** screen will be displayed, where you will use the **drop down** lists to select a **Data Table Field**, **Sort** parameter, and **Sort Order** for each newly added field.



To delete fields from this report, click on the **"x"** to the left of the **Field** you wish to **delete**, as seen in the screen that follows .

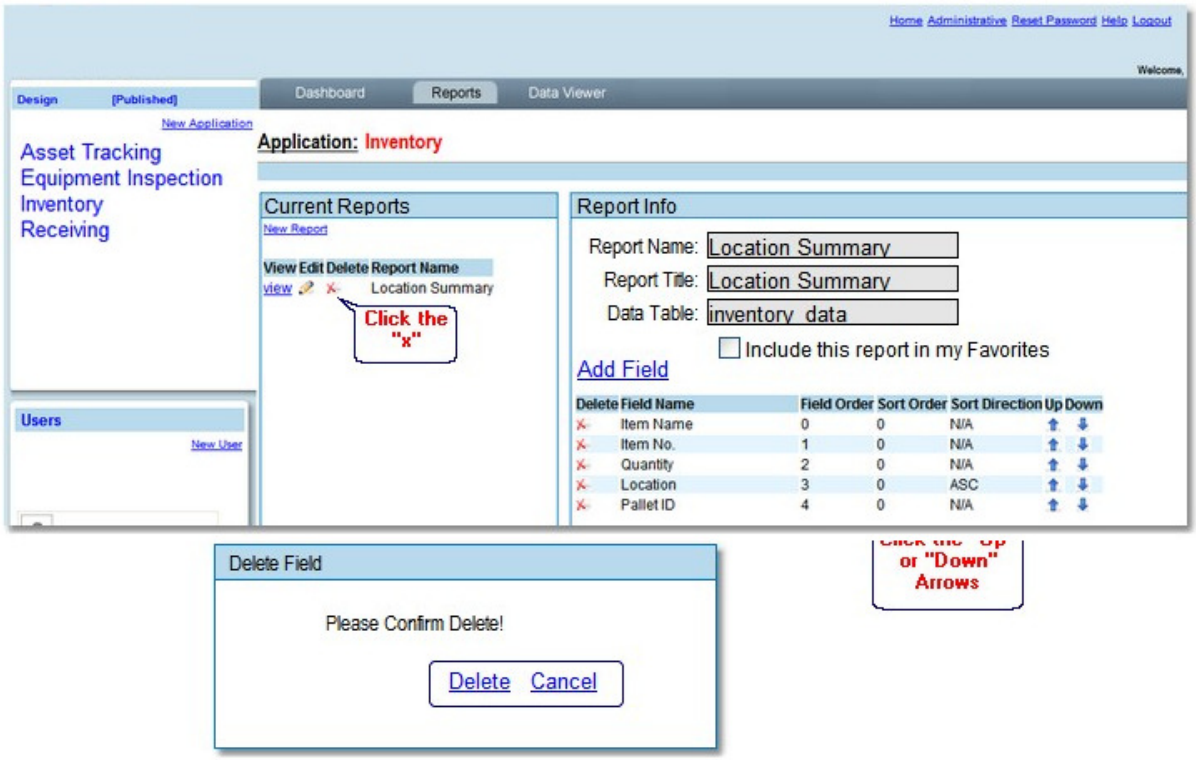
The **Delete Field** screen will be displayed. Click on **Delete** to proceed or on **Cancel** to abort this action.

You may also elect to rearrange the order in which the fields appear in your report. To perform this function, click on the **"Up"** or **"Down"** arrows to the right of the **Field** you wish to rearrange, as seen below.

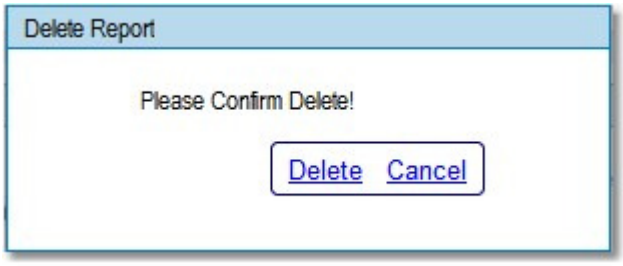


How to Delete a Report

From the **Reports** view under the **Current Reports** column, click on the **"x"** to the left of the **Report** you wish to **delete**, as seen below.



The **Delete Report** screen will be displayed. Click on **Delete** to proceed or on **Cancel** to abort this action.



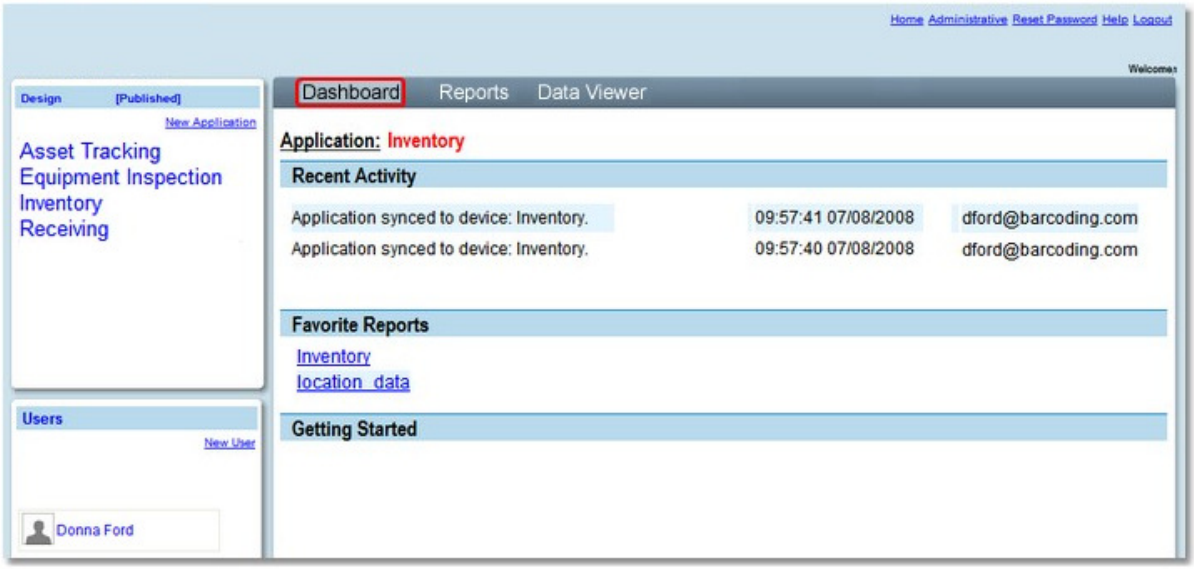
Viewing Your Dashboard

The **Dashboard** can be accessed by clicking on an **application** in the upper left panel from either the **Design or Published** views.

This will launch the **Dashboard** view that follows, which enables you to manage the **Reports** and **Data Tables** for the **Application** selected.

If **Published**, it contains a summary of your **Recent Activity** for the application selected and **Favorite Reports**.

Please Note: If an application is chosen from the **Design** view, the **Dashboard** will also contain a **Designer** tab in addition to the **Reports** and **Data Viewer** tabs.



Using ScanSeek on a Mobile Device

Once applications have been **designed**, **tested**, **validated**, and **published** using the **ScanSeek Web-Based Application**, you can deploy them to your **Mobile Device** and begin **collecting data**, as instructed in the chapters that follow.

How to Perform the Initial Sync

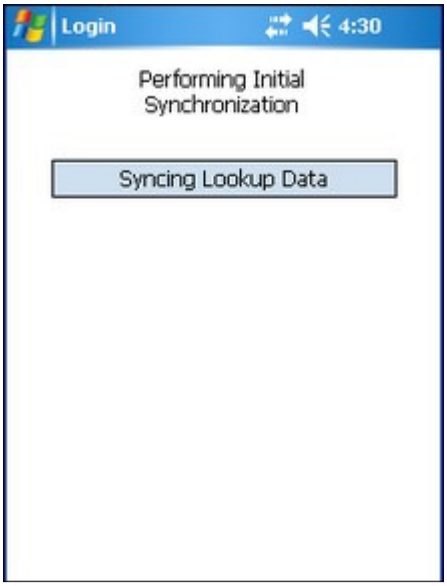
After installing **ScanSeek** on your mobile device, select the **icon** from the **Start Menu**, as seen below, to launch the application.

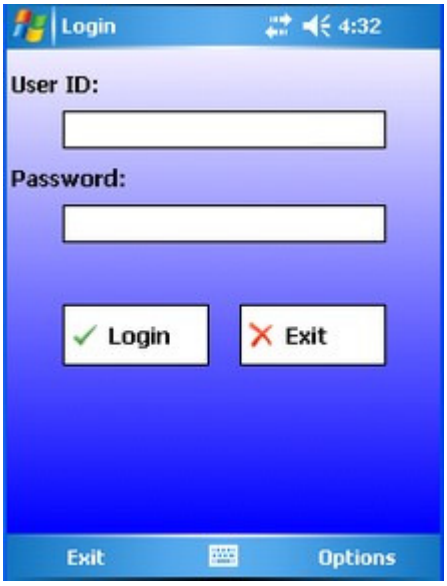
Please Note: If the icon is not displayed under the **Start Menu**, locate the application on the **Programs** screen.

The screen seen below will be displayed. Click on **Tap Here to Register** to proceed. As shown in the second and third screen shots below, the registration was successful.

Following registration, the screen seen below will be displayed. Click on **Start**. This will launch the **Initial Synchronization** of **Users**, **Applications**,

and **Lookup Data**. Upon completion, the **Login** screen will be displayed. Enter your **User ID** and **Password** and then click the **Login** button.





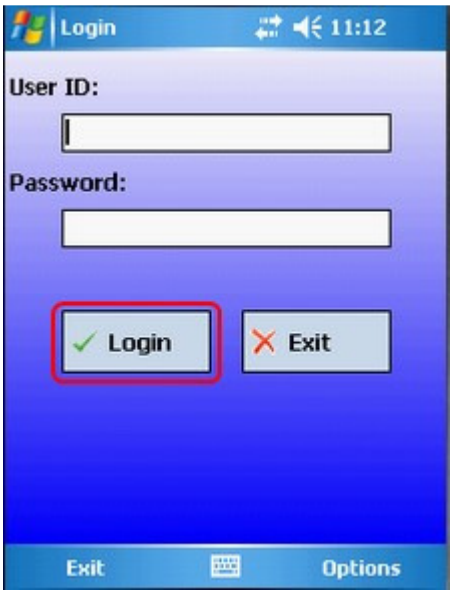
How to Log In

To login to **ScanSeek**, select the ScanSeek application from the **Start Menu** **or** from the **Programs** screen.

At the screen seen to the right, click on **Start** in the lower left corner.

The Login screen will be displayed, where you will:

- Enter your **User ID** and **Password**
- Click the **Login** button



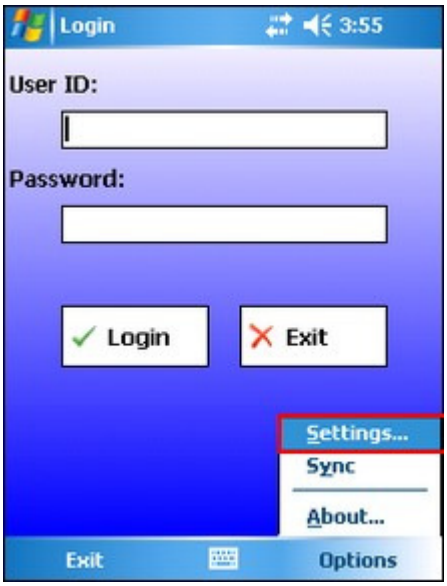
How to Verify Server Settings

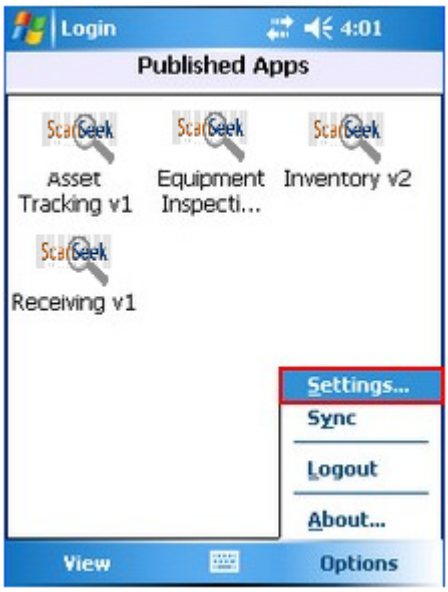
Server Settings can be verified from two different screens:

- From the **Login** screen, click on **Options** in the lower right corner, as seen below, and then click on

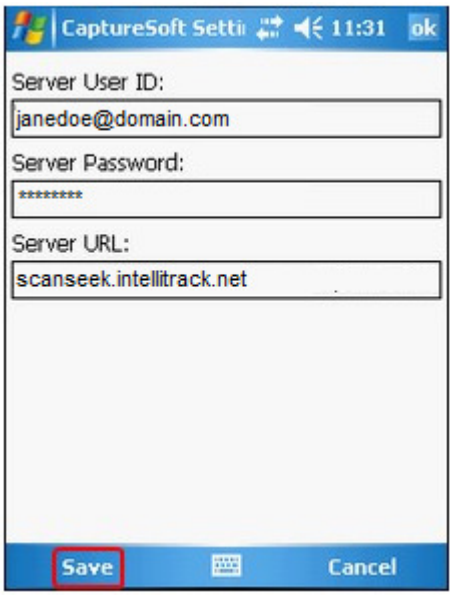
Settings.

- **After** logging in, click on **Options** from the **Applications** screen and then select **Settings**.





This will launch the screen seen below which displays your **Server User ID** and **Password** as well as the **Server URL**. If changes are made to any of these three fields, click on **Save** or click on **Cancel** to retain the current settings.



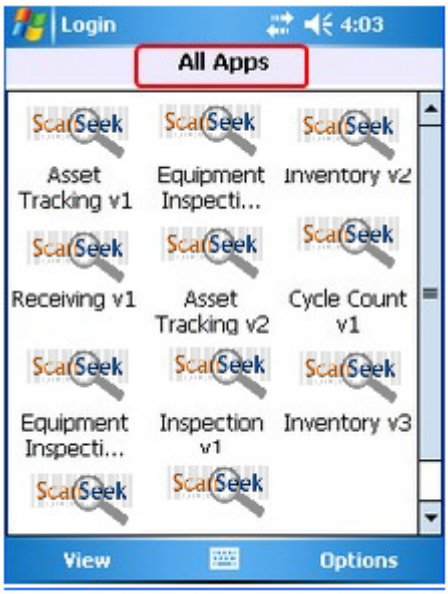
How to Change Views

Upon logging in, the first screen seen below will be displayed showing all **Published Applications**.

By clicking on **View** in the lower left corner, as seen in the first screen below, you can choose to change the view to **Design Apps.** or **All Apps.**

These different types of applications are defined below:

- **Published:** An application whose design has been finalized and then published using the **ScanSeek Web-Based Application**. Once published, applications can be accessed by **Non-Administrative Users**.
- **Design:** An application that is still being created, tested, and validated using the **Web-Based Application**, but has not yet been published.
- **Other:** Applications that are not being designed or have not been published through the **Web-Based Application**. These could include **Custom Applications** that are being designed by **Barcoding Inc.**



How to Change Preferences

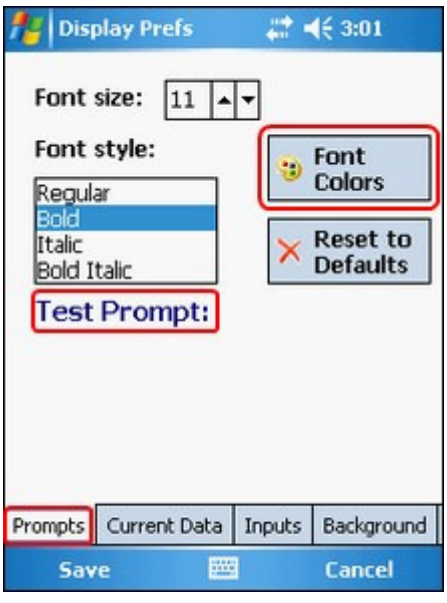
The **Preferences** option, which will enable you to change the screen's appearance, can be accessed from **any screen within an application**. To review current settings, select **Display Preferences**, as seen below.

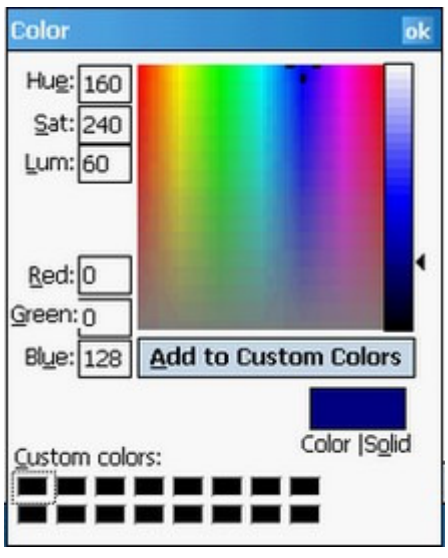
Once selected, the **Display Prefs** screen at the **Prompts** tab will be displayed, as seen in the following screen. From here you can:

- Change the **Font Size**
- Change the **Font Style**
- Select a **New Font Color**

Clicking on the **Font Colors** button will launch the **Color Picker** as seen in the second screen below. From here, you can select from the **Basic Colors** displayed **or** click on the **Define** button to create a **Custom Color** using the **Color Palette**, as seen in the final screen.

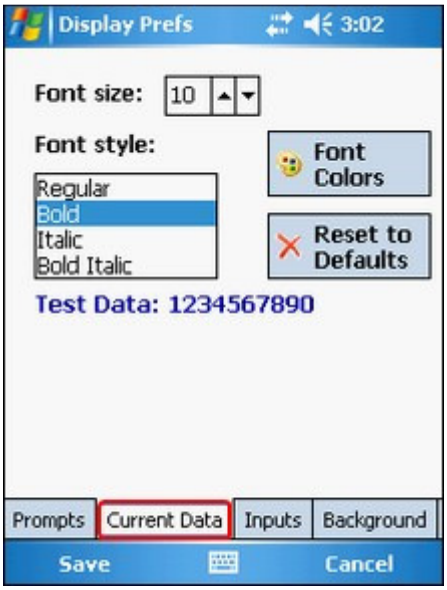
If any of these parameters are modified, the **"Test Prompt"** will change to reflect the new **Size**, **Style**, or **Color** chosen. Click on **Save** to accept these changes. If you wish to restore the screen to its original appearance, click on the **Reset to Defaults** button. To return to the **Application**, click on **Cancel**.

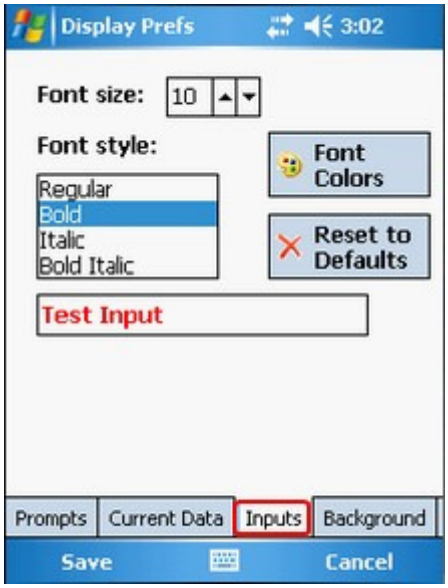




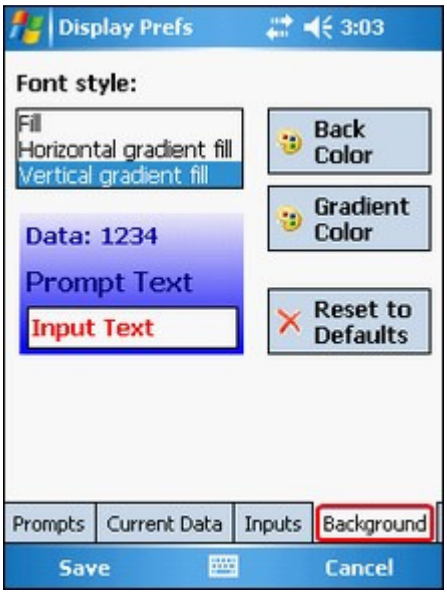
Follow the same process described above to change the appearance of **Current Data** or **Inputs** by selecting the

appropriate tab, as seen in the two screens below. Once again, if modified, **"Test Data"** and **"Test Input"** will change to reflect the new **Size**, **Style**, or **Color**. **Save** your changes or click on **Reset to Defaults**.





From the **Background** tab, seen below, you can select **"Fill"** **or** **"Gradient"** options and define their **Colors**. As with the previous screens, the **"Input Text"** will change to reflect any modifications made.



How to Launch an Application

Regardless of the view chosen, simply click on an **Application** to launch it. As seen below, the **Inspection v1** application has been selected from the **Published Apps** screen.

The first screen displayed will be determined by the order in which the **Fields** were arranged when designing the application.

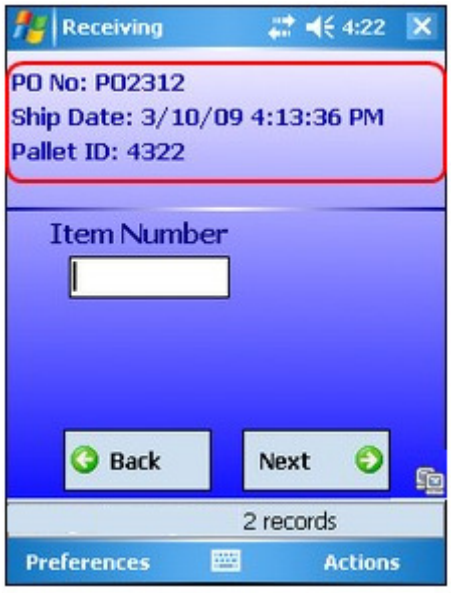
> **Please Note:** The **lower portion** of each screen within an application will contain the **Preferences** and **Actions** options as well as the **User ID** and **Records Count**, as seen below.

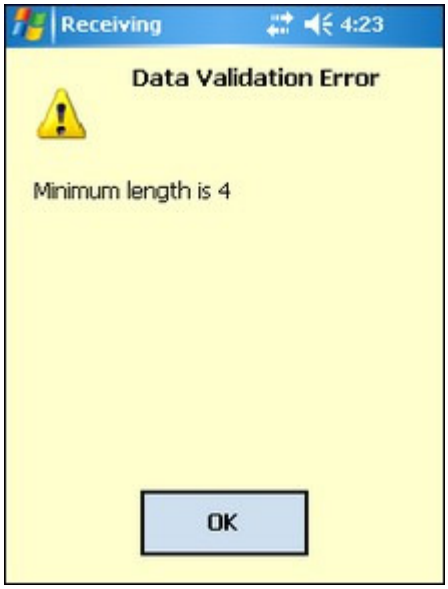
How to Collect Data

As data is collected for the application chosen, the **top portion** of each screen, as illustrated below, will be populated with the **Display Values** established when designing the application in the Web-Based Application.

> **Please Note:** If **Display Values** on the **Mobile Device** exceed **three**, a **scroll bar** will be displayed to allow for the viewing of all values.

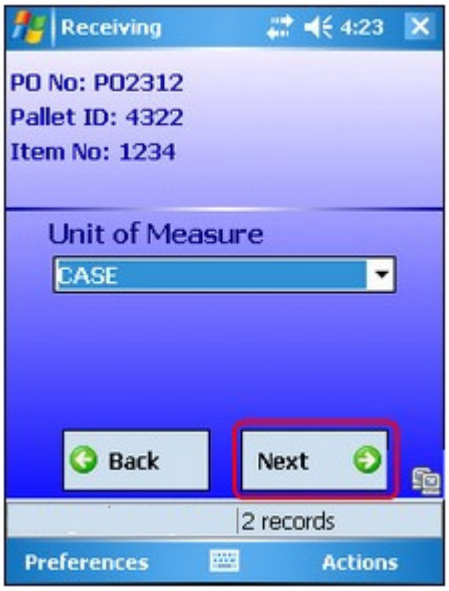
When data is entered improperly, a **Data Validation Error** will be displayed. This message is also based on the **Input Validation** entered for that field during the **Design** phase. Tap on **OK** to close the **Error** and enter the data correctly.

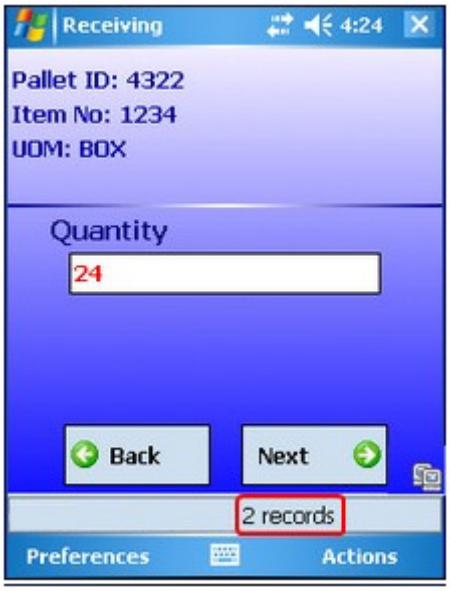




Proceed through each of the fields by clicking on the **Next** button or on **Back** to return to the previous field.

> **Please Note:** The **Records Count** will increase as data is collected, as seen in the second screen below, and will be reset to **"zero"** when the application is restarted.

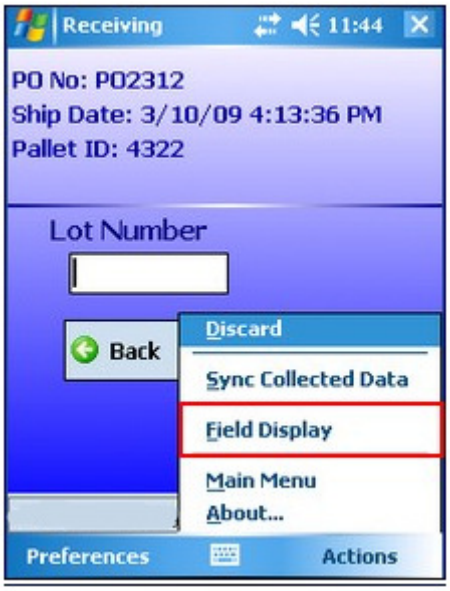


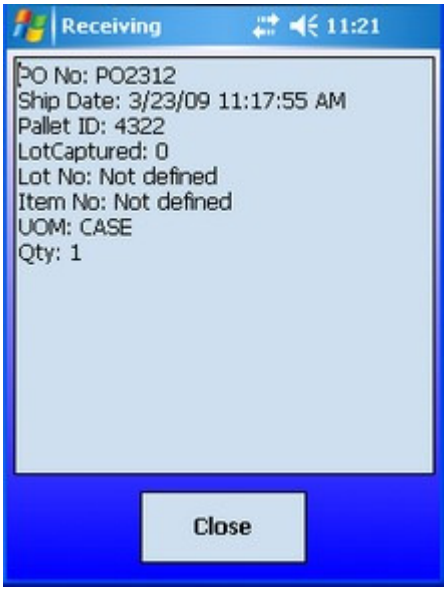


If you wish to view the data collected for the **current record**, click on **Actions** in the lower right corner of the screen and then select **Field Display**, as seen in the first screen that follows. This will generate the second screen seen below, which contains the **values** for the fields collected.

Please Note: The **Actions** option can be accessed from **any screen within an application**.

When you have finished collecting data for this application, click on the **"x"** in the upper right corner. You will be returned to the **Applications** screen in the **View** originally chosen (**Published**, **Design**, or **All**), as seen in the final screen below.





If at any time, you wish to **remove** a record, click on **Actions** in the lower right corner, as seen in the following screen, and select the **Discard** option. Doing so will generate the **Discard Confirmation** screen Click on **Yes** to proceed or on **No** to abort this action.

Please Note: Only **current**, incomplete records can be discarded.

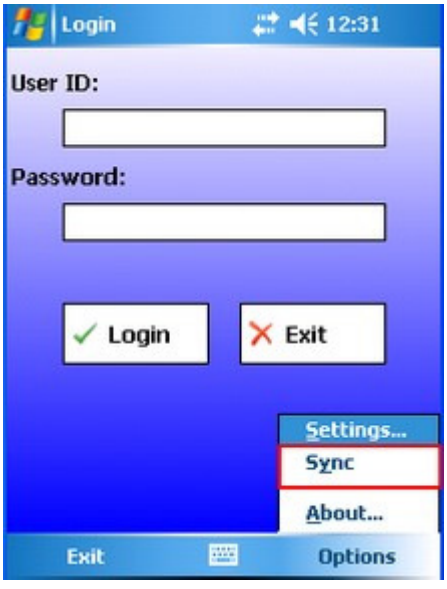
Also Note: The **Discard** option is **inactive** on the **first screen** of the application.

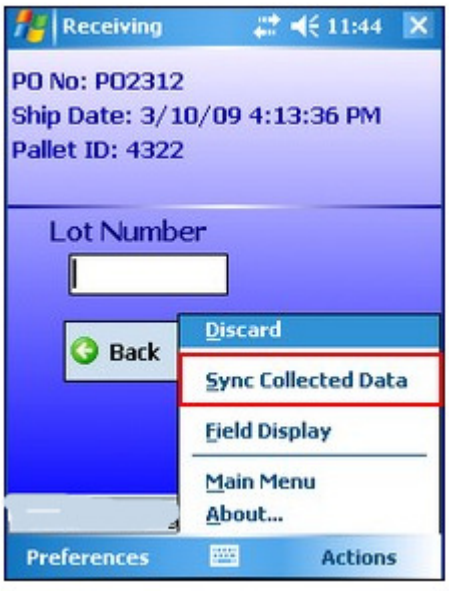
How to Synchronize

The **Mobile Device** will synchronize **automatically** when it can communicate via **ActiveSync**, **802.11**, or **Wireless Wide Area Network (WWAN)**.

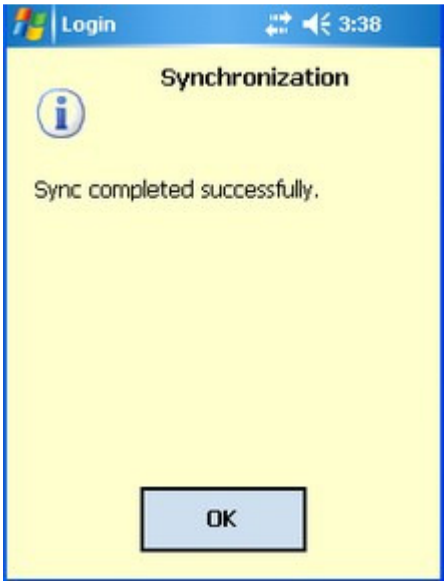
If a **manual synchronization** is necessary, it can be accomplished from **three** different screens, as illustrated below:

- From the **Login** screen, click on **Options** in the lower right corner and then click on **Sync**.
- **After** logging in, click on **Options** from the **Applications** screen and then select **Sync**.
- After launching an **Application**, click on **Actions** in the lower right corner and select **Sync Collected Data**.





Regardless of the method chosen, **ScanSeek** will synchronize **Users**, **Applications**, and **Lookup Data** and will **Back-Up Applications**. A **status bar** will be displayed along the bottom of the screens as the sync progresses. If the synchronization is successful, the screen seen below will be displayed.



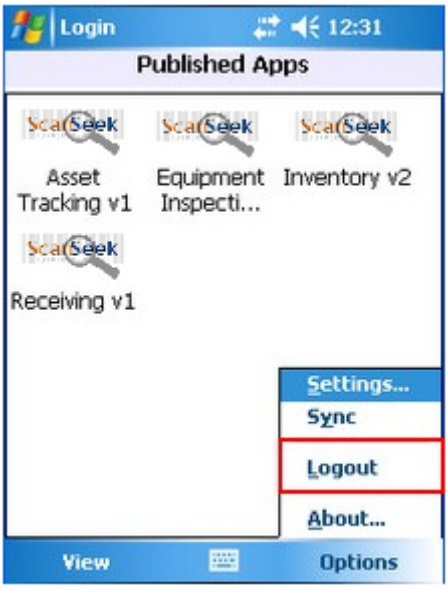
Sync status icons can be found in the lower right corner of the screen. The icons and their definitions are as follows:

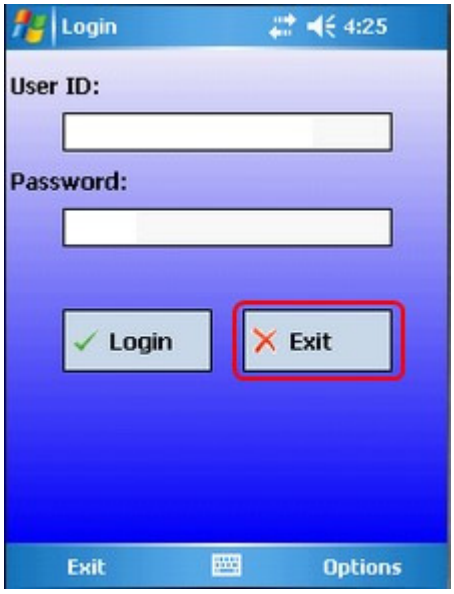
- Mobile Device is Synchronized
- Sync is in Progress
- There are Records that need to be Stored and Synchronized
- Sync Failed - Data has not been Uploaded to the Server, but has been Stored on the Mobile Device

How to Log Out

To **log out** of the **Mobile Device**, return to the **Published**, **Design**, or **All Applications** screens, as illustrated in the first screen below. Next, click on **Options** in the lower right corner and select **Logout**.

You will be returned to the **Login** screen, where you will click on the **Exit** button.





Technical Support

IntelliTrack Inc. is available to answer your questions and assist you with understanding the features of **ScanSeek** via telephone or e-mail.

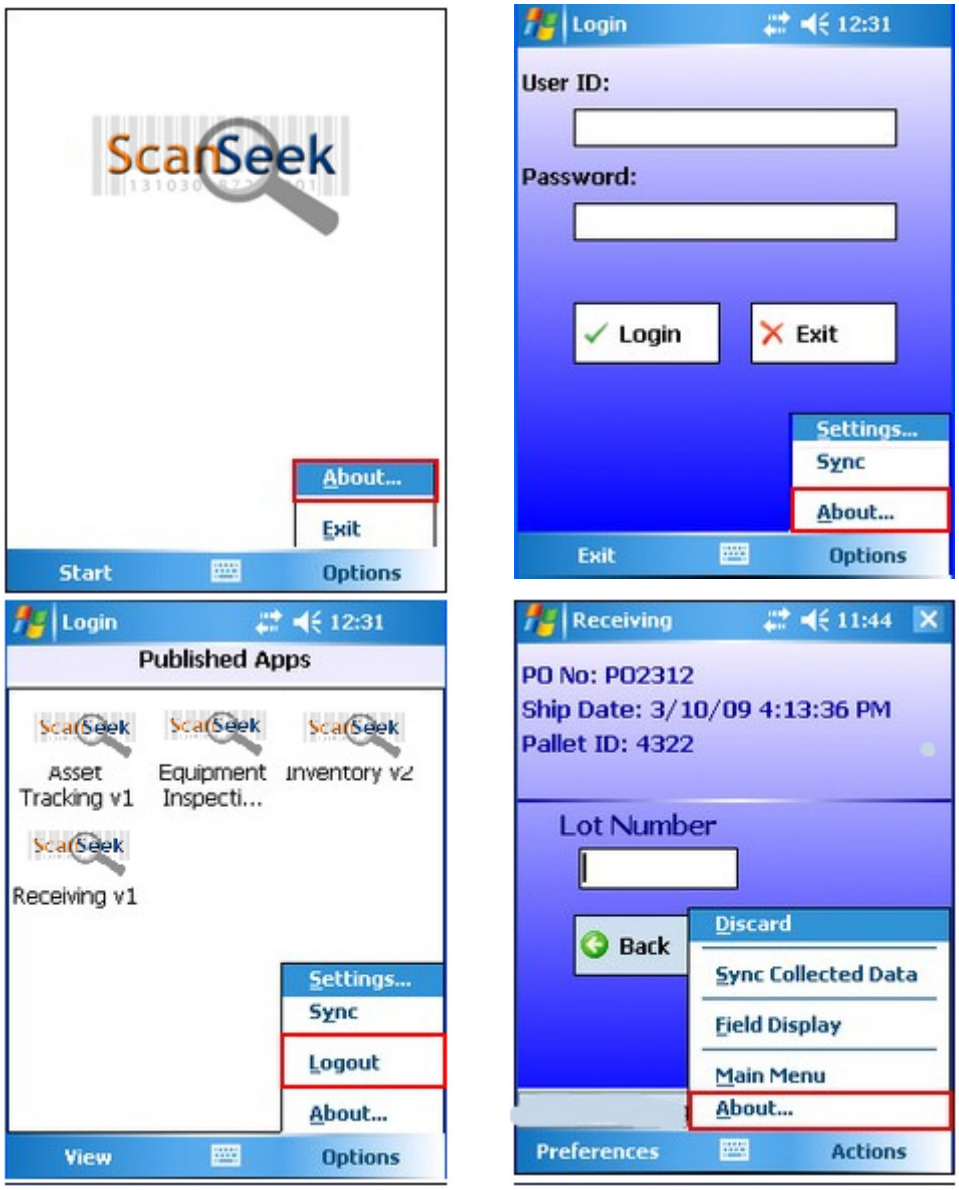
Our **Help Desk** is open **Monday** through **Friday** between the hours of **8:00 a.m.** and **5:00 p.m. (EST)**, except Holidays. To reach the Help Desk, dial **1-888-583-3008** or, if you prefer to **e-mail** your questions, please send them to **techsupport@intellitrack.net.**

During a support call, you may be asked to provide **IntelliTrack's Technical Support Team** with information regarding your **ScanSeek** Registration and Version information or you may be asked to send a Log File. This chapter will assist you with locating this information on your mobile device.

How to View Registration Information

ScanSeek contains an **About** page which displays **Registration Information.** It can be accessed from **four** different screens, as illustrated below:

- From the **Start** screen, click on **Options** in the lower right corner and then select **About**.
- From the **Login** screen, click on **Options** in the lower right corner and then select **About**.
- **After** logging in, click on **Options** from the **Applications** screen and then select **About**.
- After launching an **Application**, click on **Actions** in the lower right corner and select **About**.



The **About** page, seen below, contains the **Registered Serial Number** for this mobile device.

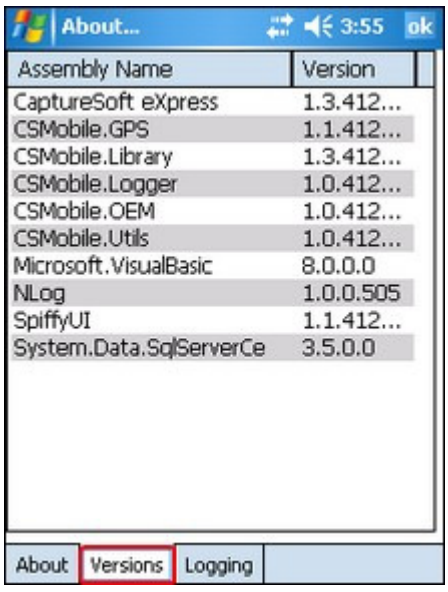
Please Note: Each device will have its own unique Serial Number.

The **About** page also contains the **Version Number** for the **Mobile Client** only along with **Copyright** information. To exit this screen, click on **ok** in the upper right corner of the screen.

How to View Version Information

Version Information for all files can be accessed by clicking on the **Versions** tab from the **About** page, as seen in the screen that follows.

To exit this screen, click on **ok** in the upper right corner of the screen.



How to Send Log Files

To **Send Device Logs** to **Technical Support**, click on the **Logging** tab from the **About** screen, as seen below.

Please Note: This action requires a connection to the Internet.

To exit this screen, click on **ok** in the upper right corner of the screen.

About...
3:55
ok
Send device logs to Support. Note that this requires a connection from the device to the internet. No personal data will be collected.
Send Device Logs
About
Versions
Logging